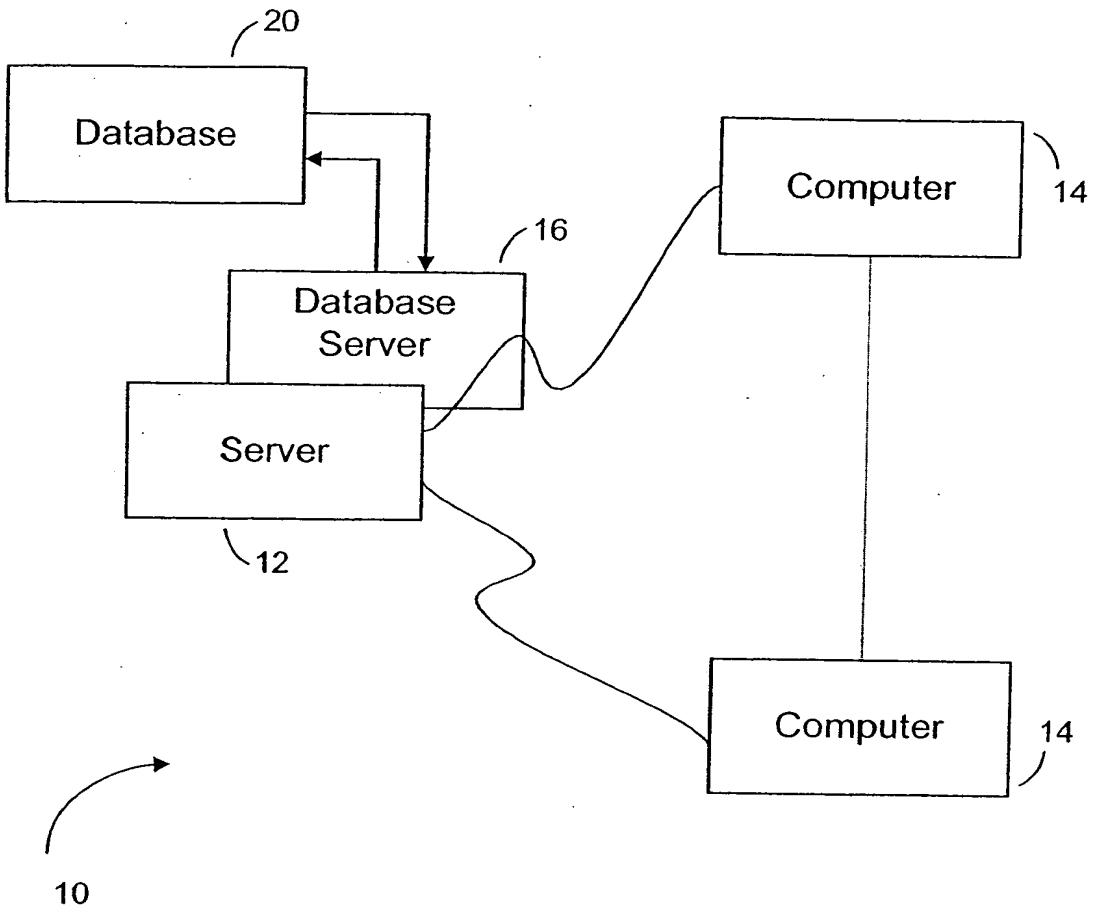
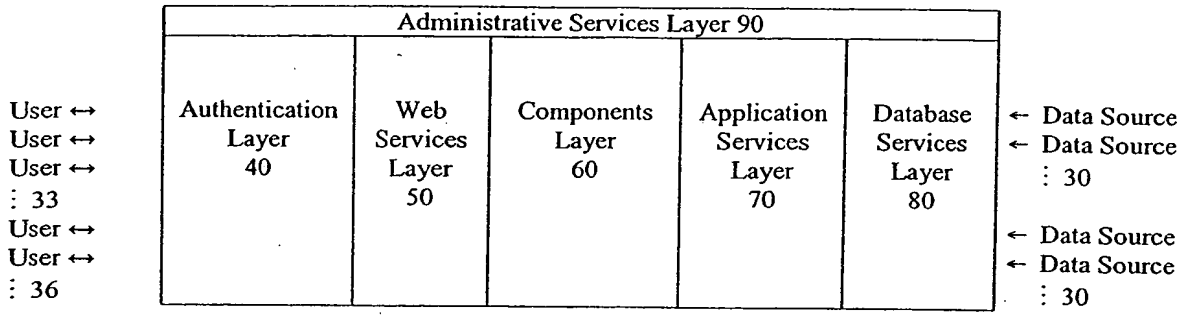

20
Database
Computer
14
16
Database
Server
Server
12
Computer
14
10

FIG. 1/62

FIG. 2/62



N-Tier Architecture Overview

10

FIG. 3/62

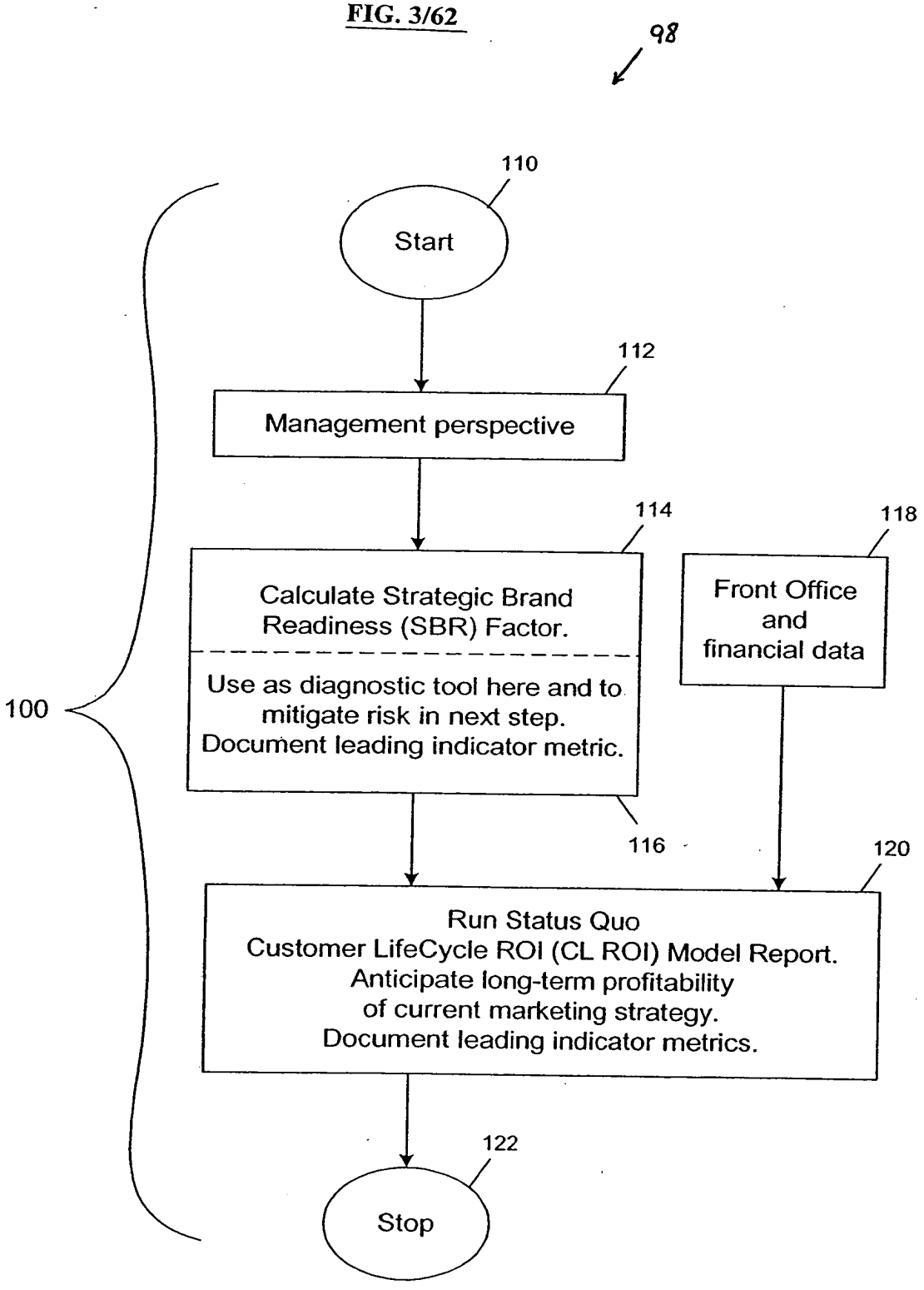

98
110
Start
112
Management perspective
114
Calculate Strategic Brand Readiness (SBR) Factor.
Use as diagnostic tool here and to mitigate risk in next step.
Document leading indicator metric.
116
118
Front Office and financial data
120
Run Status Quo
Customer LifeCycle ROI (CL ROI) Model Report.
Anticipate long-term profitability of current marketing strategy.
Document leading indicator metrics.
122
Stop
100

FIG. 4/62

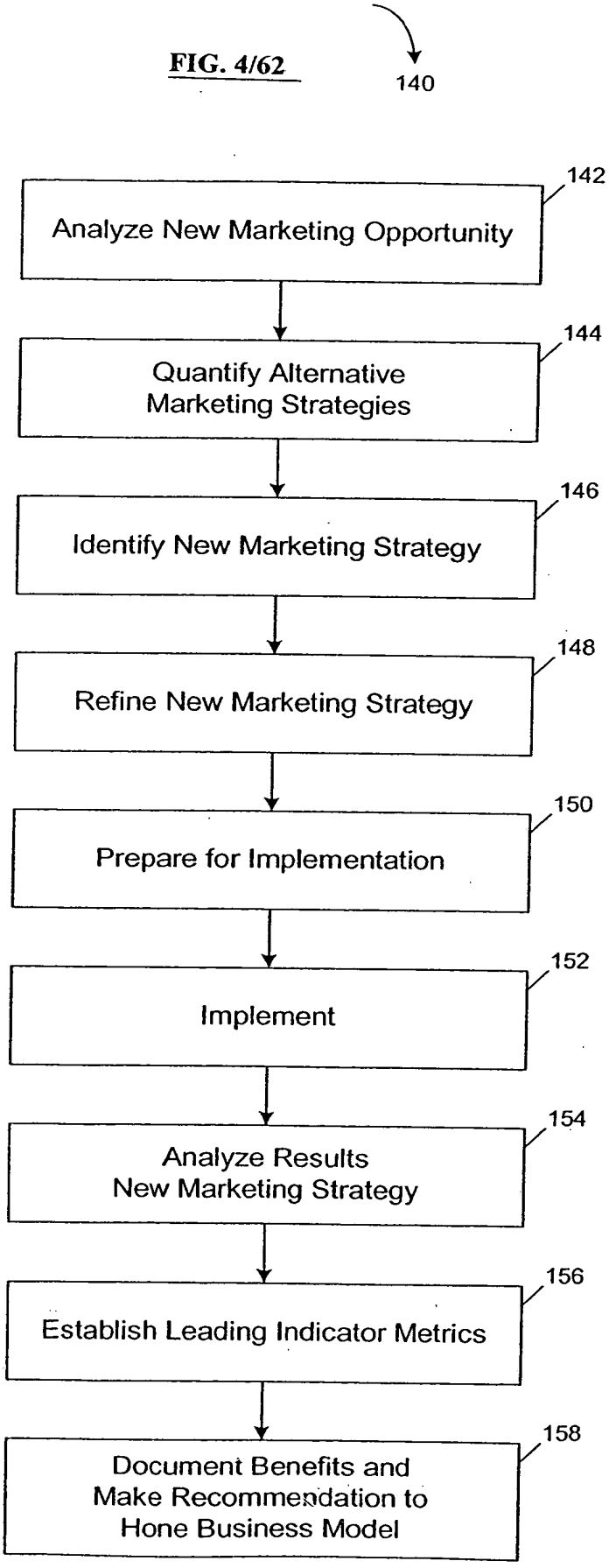

140
Analyze New Marketing Opportunity
142
Quantify Alternative Marketing Strategies
144
Identify New Marketing Strategy
146
Refine New Marketing Strategy
148
Prepare for Implementation
150
Implement
152
Analyze Results New Marketing Strategy
154
Establish Leading Indicator Metrics
156
Document Benefits and Make Recommendation to Hone Business Model
158

FIG. 5/62

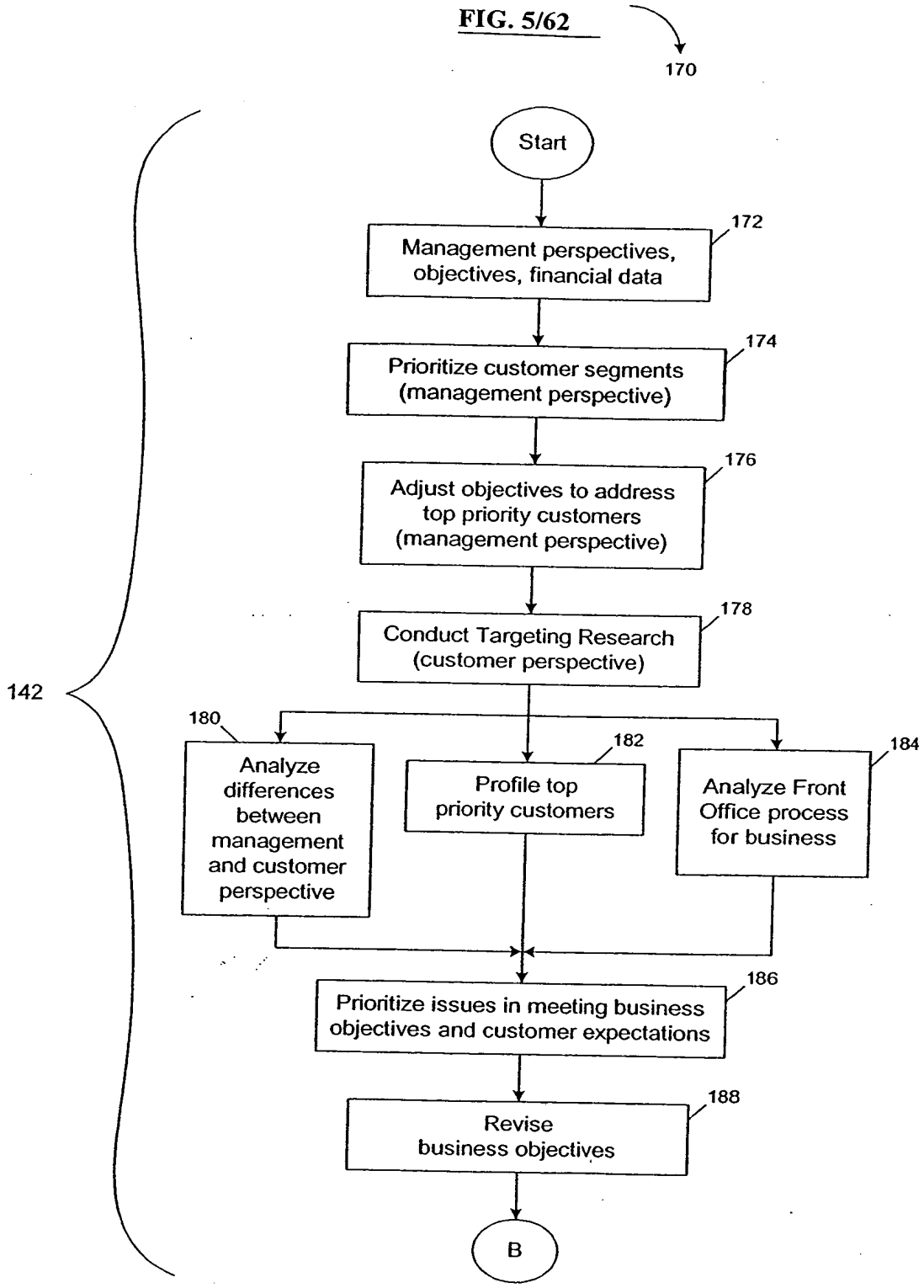

170
Start
172
Management perspectives, objectives, financial data
174
Prioritize customer segments (management perspective)
176
Adjust objectives to address top priority customers (management perspective)
178
Conduct Targeting Research (customer perspective)
142
180
Analyze differences between management and customer perspective
182
Profile top priority customers
184
Analyze Front Office process for business
186
Prioritize issues in meeting business objectives and customer expectations
188
Revise business objectives
B

FIG. 6/62

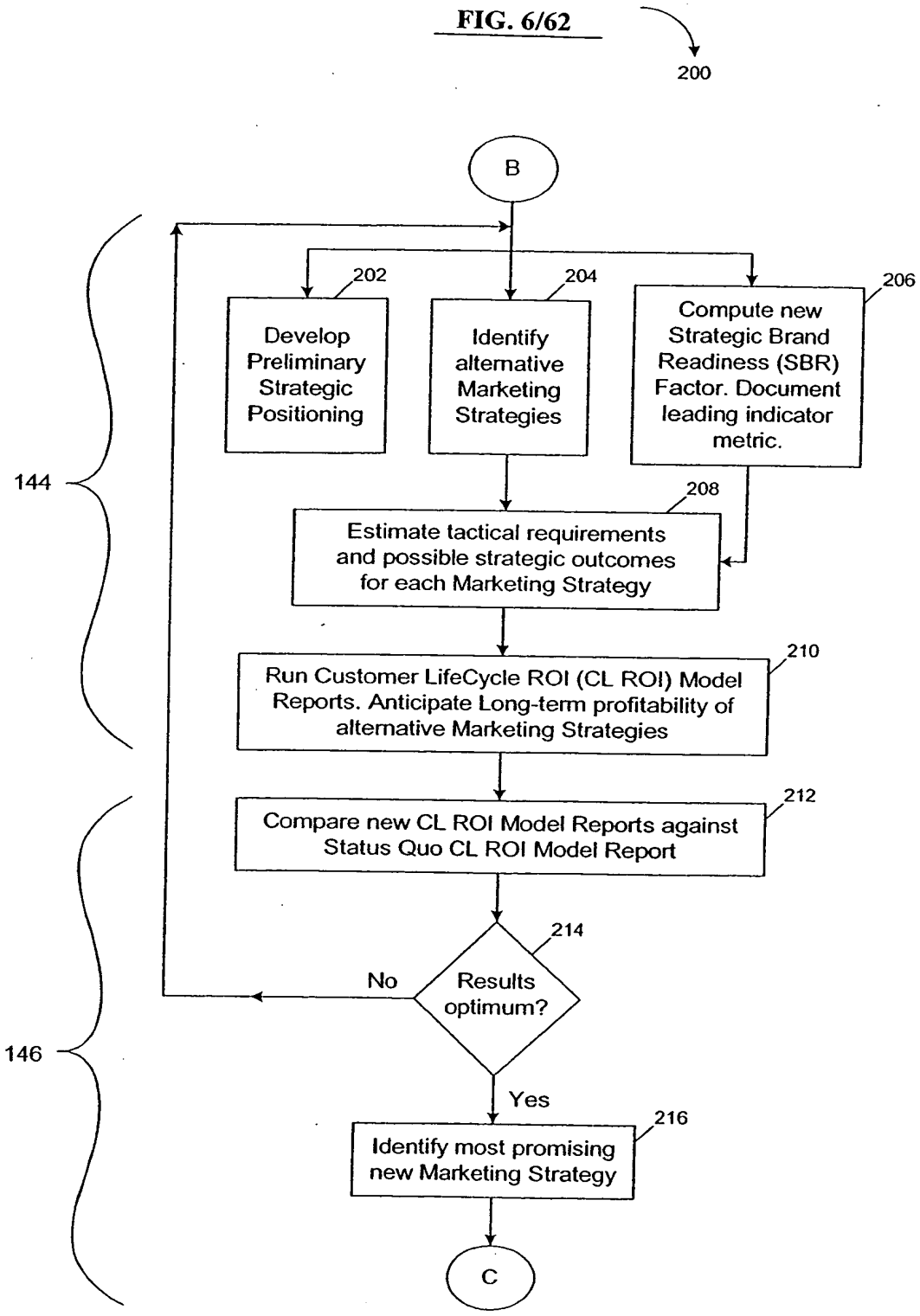

200
B
202
204
206
Develop Preliminary Strategic Positioning
Identify alternative Marketing Strategies
Compute new Strategic Brand Readiness (SBR) Factor. Document leading indicator metric.
144
208
Estimate tactical requirements and possible strategic outcomes for each Marketing Strategy
210
Run Customer LifeCycle ROI (CL ROI) Model Reports. Anticipate Long-term profitability of alternative Marketing Strategies
212
Compare new CL ROI Model Reports against Status Quo CL ROI Model Report
214
No
Results optimum?
146
Yes
216
Identify most promising new Marketing Strategy
C

FIG. 7/62

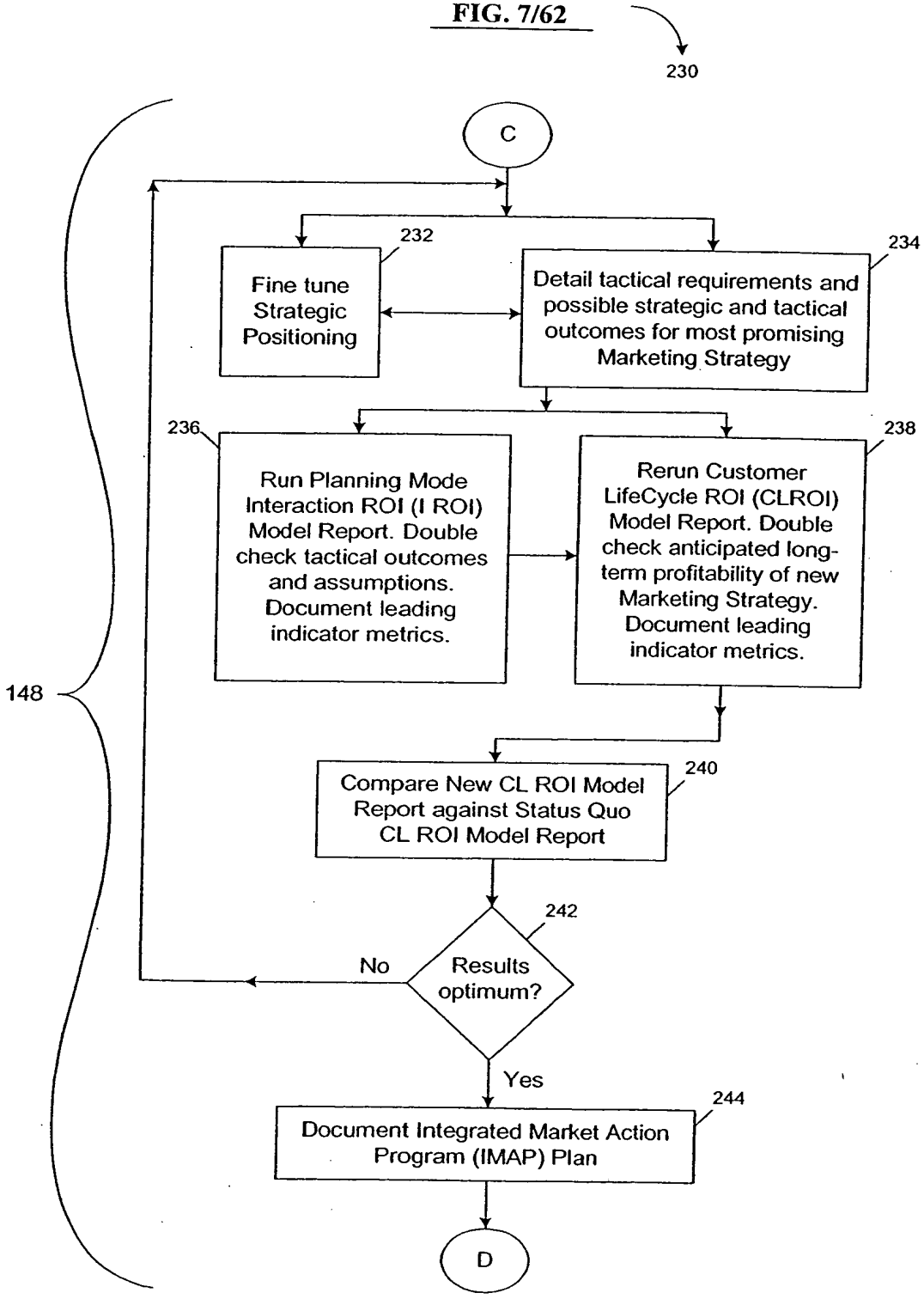

230
C
232
Fine tune Strategic Positioning
234
Detail tactical requirements and possible strategic and tactical outcomes for most promising Marketing Strategy
236
Run Planning Mode Interaction ROI (I ROI) Model Report. Double check tactical outcomes and assumptions. Document leading indicator metrics.
238
Rerun Customer LifeCycle ROI (CLROI) Model Report. Double check anticipated long-term profitability of new Marketing Strategy. Document leading indicator metrics.
148
240
Compare New CL ROI Model Report against Status Quo CL ROI Model Report
242
Results optimum?
No
Yes
244
Document Integrated Market Action Program (IMAP) Plan
D

FIG. 8/62

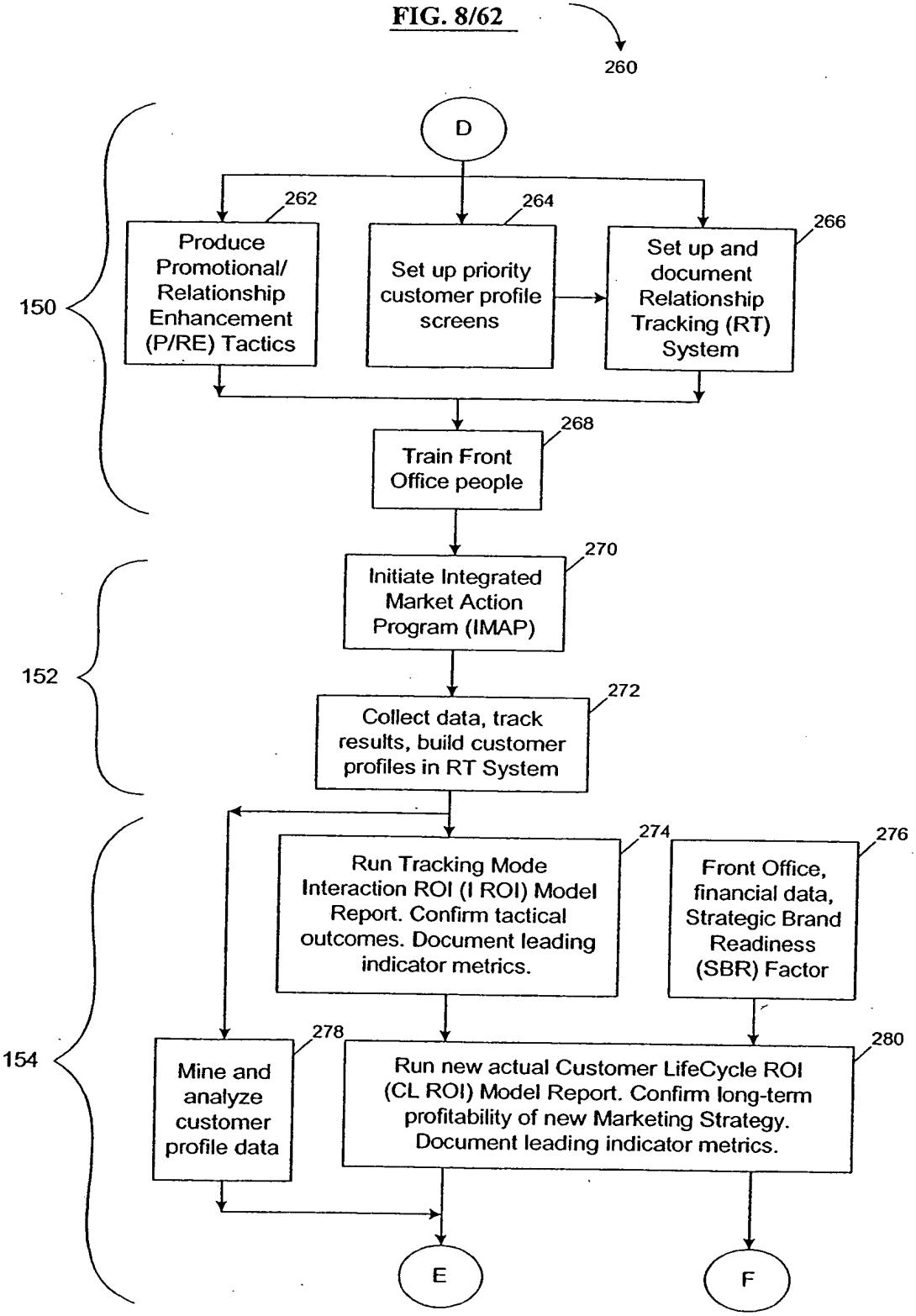
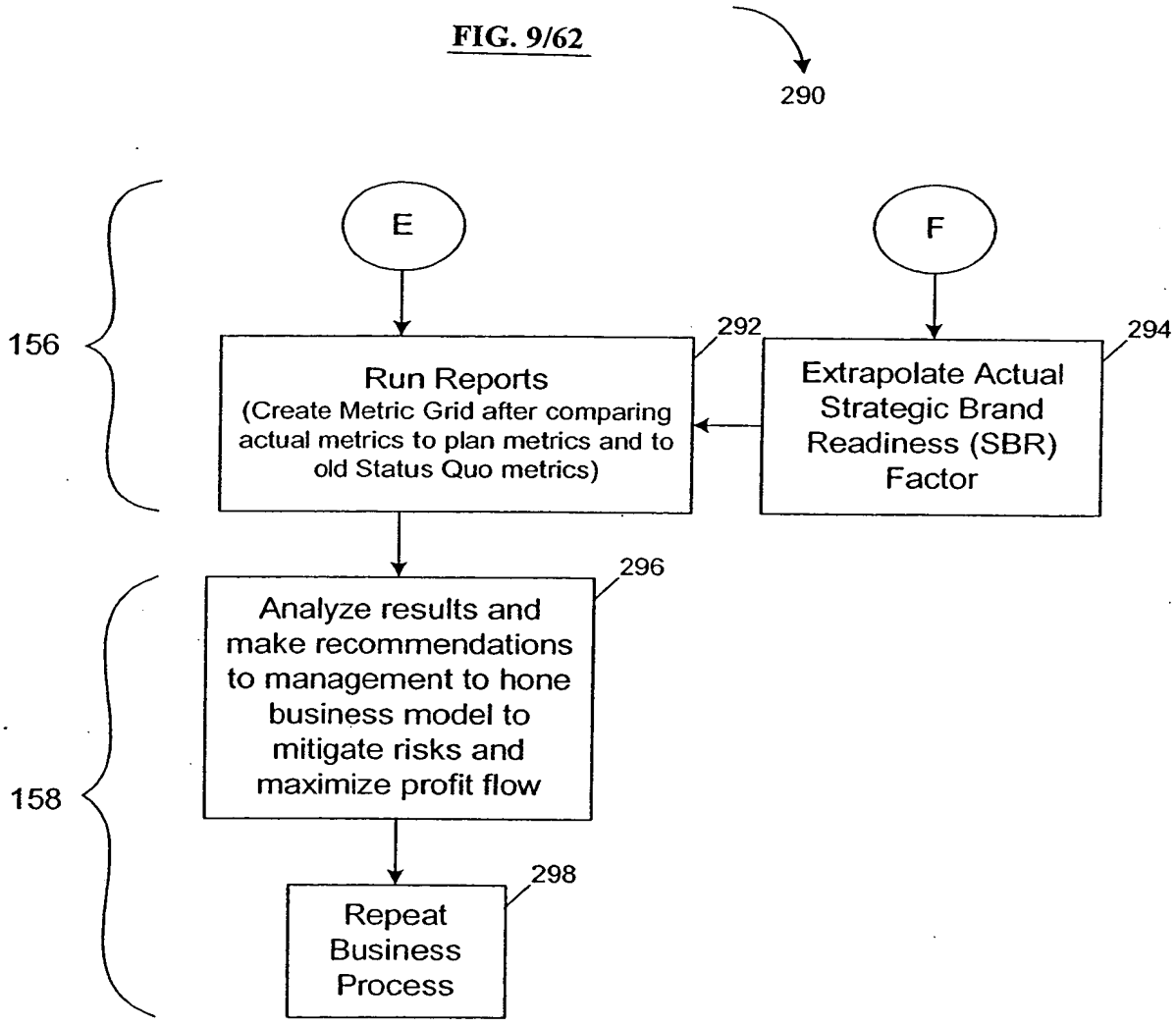

260
D
262
Produce Promotional/ Relationship Enhancement (P/RE) Tactics
264
Set up priority customer profile screens
266
Set up and document Relationship Tracking (RT) System
150
268
Train Front Office people
270
Initiate Integrated Market Action Program (IMAP)
152
272
Collect data, track results, build customer profiles in RT System
274
Run Tracking Mode Interaction ROI (I ROI) Model Report. Confirm tactical outcomes. Document leading indicator metrics.
276
Front Office, financial data, Strategic Brand Readiness (SBR) Factor
278
Mine and analyze customer profile data
280
Run new actual Customer LifeCycle ROI (CL ROI) Model Report. Confirm long-term profitability of new Marketing Strategy. Document leading indicator metrics.
154
E
F

FIG. 9/62


290
E
F
156
292
294
Run Reports
(Create Metric Grid after comparing actual metrics to plan metrics and to old Status Quo metrics)
Extrapolate Actual Strategic Brand Readiness (SBR) Factor
296
Analyze results and make recommendations to management to hone business model to mitigate risks and maximize profit flow
158
298
Repeat Business Process

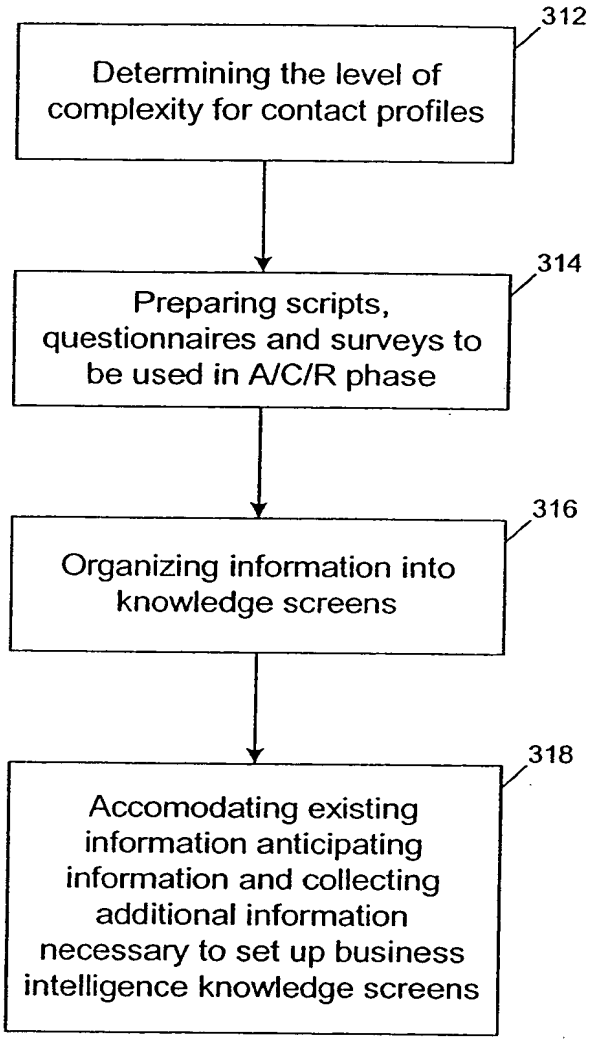

312
Determining the level of complexity for contact profiles
314
Preparing scripts, questionnaires and surveys to be used in A/C/R phase
316
Organizing information into knowledge screens
318
Accomodating existing information anticipating information and collecting additional information necessary to set up business intelligence knowledge screens
310

FIG. 10/62

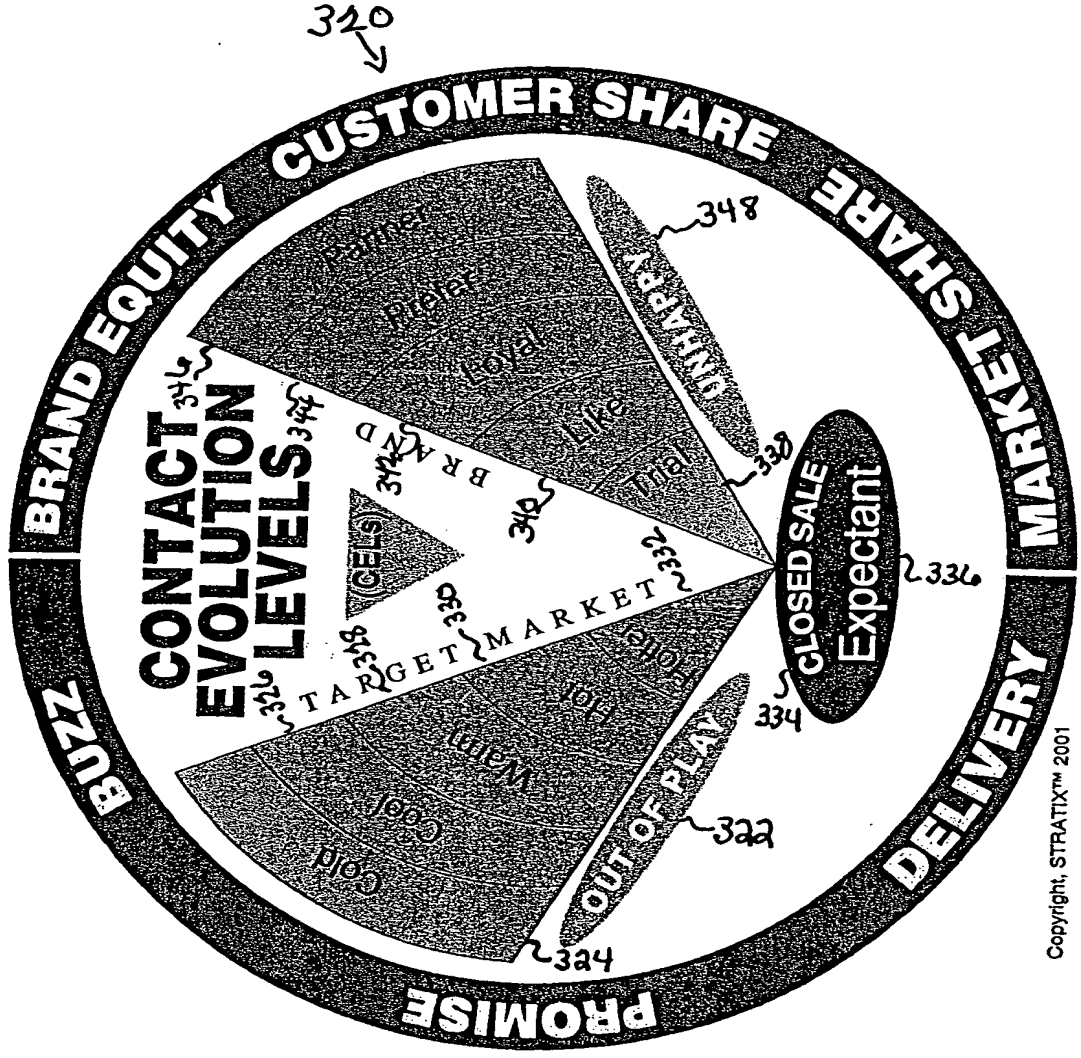

320
BRAND EQUITY
CUSTOMER SHARE
MARKET SHARE
DELIVERY
PROMISE
BUZZ
CONTACT EVOLUTION LEVELS
346
344
Partner
Prefer
Loyal
Like
Trial
UNAWARE
348
BRAND
342
(CELS)
TARGET MARKET
326
328
330
332
Cold
Cool
Warm
Hot
Hot
CLOSED SALE
Expectant
336
334
OUT OF PLAY
322
324
Copyright, STRATIX™ 2001

FIG. 11/62

TACTICS PLAN OVERVIEW

Closed-loop Marketing, Sales, Customer Care

(EXAMPLE: XYZ Company)

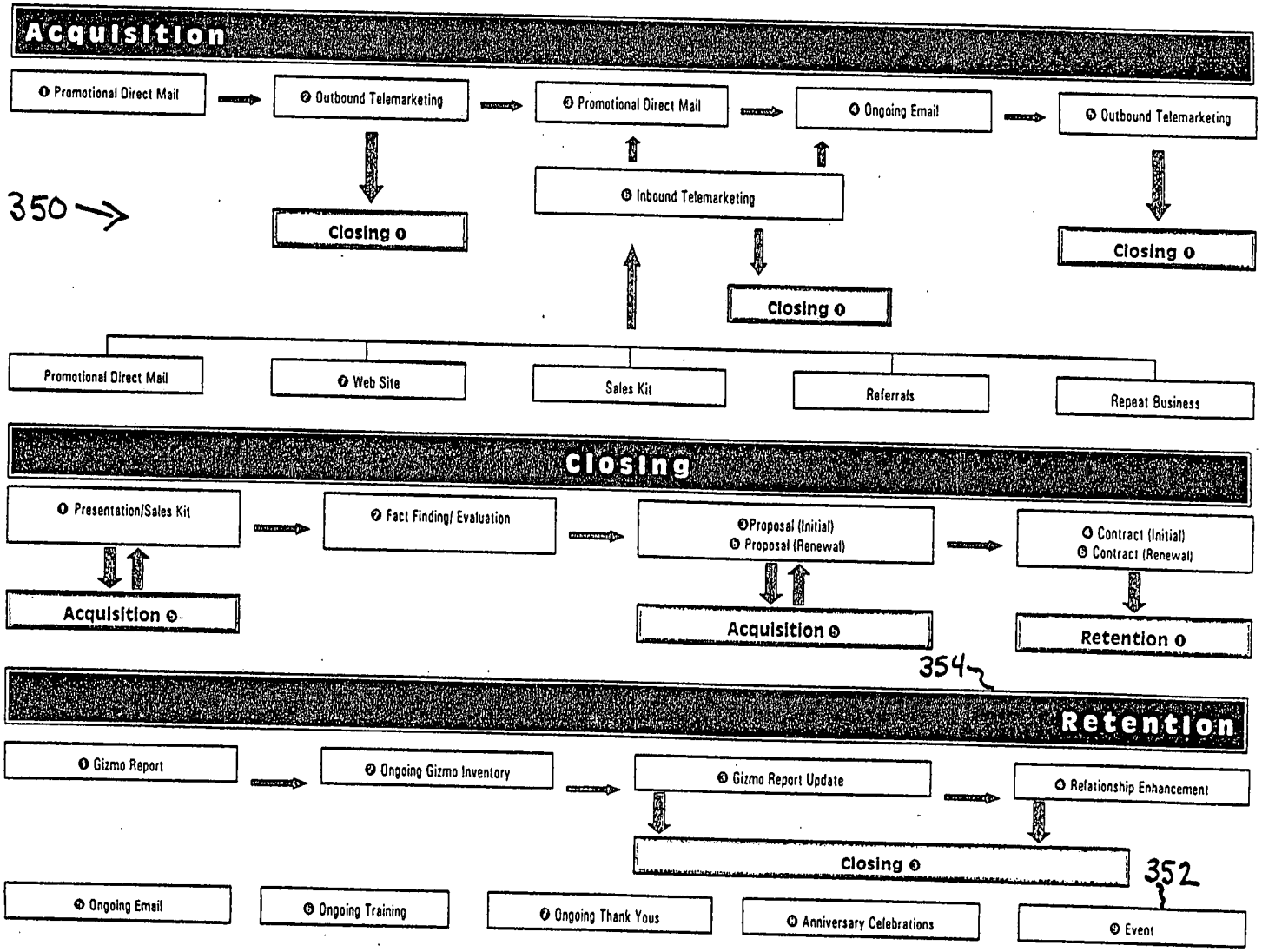


FIG. 12/62

© 2001 STRATIX™

Tactics Grid

	Phases		
Promotional/Relationship Enhancement Tactics	**Acquisition**	**Closing**	**Retention**
Advertising	X		
Promo Direct Mail	X		
Telemarketing	X		
Sales Promotion	X	X	
Seminars/Conferences	X	X	X
Trade Shows	X	X	X
Special Events	X	X	X
Presentations		X	
Sales Materials		X	
Status Reports		X	X
Documentation	X	X	X
Training			X
Technical Support			X
Company Literature	X	X	X
Newsletters	X	X	X
Web Site	X	X	X
Public Relations (PR)	X	X	X
Ongoing Telemarketing	X	X	X
Ongoing Direct Mail	X	X	
Ongoing PR	X	X	X
Email Campaigns	X	X	X
Ongoing Thank Yous	X	X	X
Web Newsletter	X	X	X
Web Advertising	X		
Web Sponsorships	X		X
Web PR	X	X	X
Community	X	X	X
Ecommerce	X	X	X
Sponsorships	X	X	X
Strategic Alliances	X	X	X
Viral Marketing	X	X	X
Affinity Marketing	X	X	X
Coop Advertising	X		
Cross Selling Programs		X	X
Recognition Programs			X
Charitable Contributions			X

Personal Interaction Tactics	**Acquisition**	**Closing**	**Retention**
Custom Communication	X	X	X
Custom Interaction		X	X
Personal Touch	X	X	X
Extraordinary Events	X	X	X

360

FIG. 13/62

370

Relative Interaction Value (RIV) Number Grid

Promotional/Relationship Enhancement Tactics	Phases: Acquisition RE+ Impt=RIV#	Closing RE+ Impt=RIV#	Retention RE+ Impt=RIV#
Advertising	.000+.010=.010		
Promo. Direct Mail	.010+.020=.030		
Telemarketing	.030+.010=.040		
Sales Promotion	.030+.030=.060	.030+.070=.100	
Seminars/Conferences	.050+.020=.070	.010+.030=.040	.020+.050=.070
Trade Shows	.010+.010=.020	.010+.020=.030	.010+.030=.040
Special Events	.080+.060=.140	.080+.060=.140	.090+.080=.170
Presentations		.050+.050=.100	
Sales Materials		.000+.040=.040	
Status Reports		.070+.080=.150	.090+.010=.180
Documentation	.000+.010=.010	.000+.060=.060	.010+.070=.080
Training			.050+.070=.120
Technical Support			.080+.080=.160
Company Literature	.000+.010=.010	.000+.010=.010	.000+.020=.020
Newsletters	.000+.010=.010	.000+.010=.010	.070+.040=.110
Web Site	.030+.030=.060	.040+.040=.080	.060+.060=.120
Public Relations (PR)	.000+.050=.050	.000+.030=.030	.000+.040=.040
Ongoing Telemarketing	.060+.020=.080	.020+.010=.030	.010+.020=.030
Ongoing Direct Mail	.010+.030=.040	.010+.010=.020	
Ongoing PR	.000+.030=.030	.000+.010=.010	.000+.020=.020
Email Campaigns	.020+.020=.040	.020+.040=.060	.020+.040=.060
Ongoing Thank Yous	.100+.080=.180	.100+.080=.180	.100+.090=.190
Web Newsletter	.010+.010=.020	.010+.010=.020	.080+.040=.120
Web Advertising	.010+.010=.020		
Web Sponsorships	.010+.020=.030		.010+.020=.030
Web PR	.000+.020=.020	.000+.010=.010	.000+.020=.020
Community	.050+.050=.100	.060+.060=.120	.070+.070=.140
Ecommerce	.030+.050=.080	.050+.050=.100	.030+.040=.070
Sponsorships	.030+.030=.060	.030+.040=.070	.030+.030=.060
Strategic Alliances	.030+.030=.060	.030+.040=.070	.030+.030=.060
Viral Marketing	.050+.050=.100	.060+.060=.120	.050+.050=.100
Affinity Marketing	.050+.040=.090	.030+.060=.090	.050+.040=.090
Coop Advertising	.010+.030=.040		
Cross Selling Programs		.060+.040=.100	.100+.080=.180
Recognition Programs			.100+.100=.200
Charitable Contributions			.080+.050=.130

Personal Interaction Tactics	Acquisition	Closing	Retention
Custom Communication	.060+.060=.120	.080+.070=.150	.070+.080=.150
Custom Interaction		.080+.070=.150	.070+.080=.150
Personal Touch	.100+.080=.180	.100+.080=.180	.100+.090=.190
Extraordinary Events	TBD	TBD	TBD

FIG. 14/62

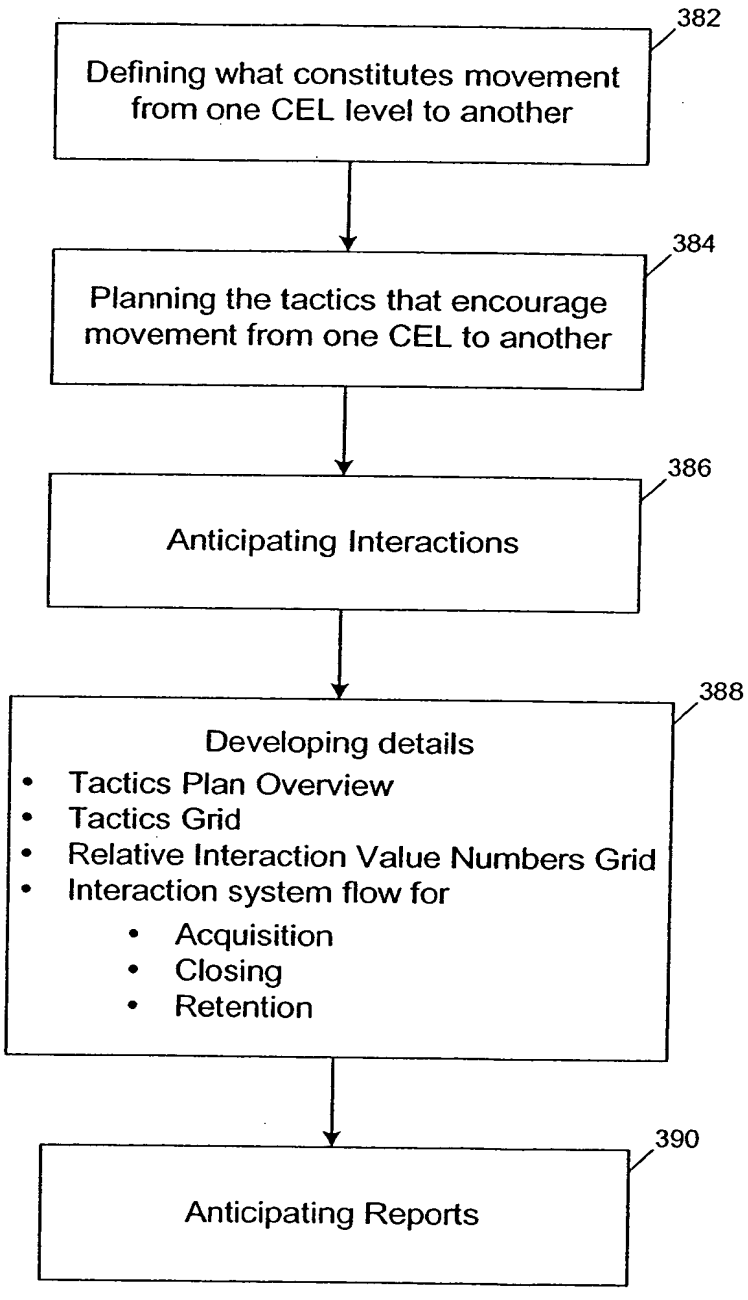

382
Defining what constitutes movement from one CEL level to another
384
Planning the tactics that encourage movement from one CEL to another
386
Anticipating Interactions
388
Developing details
• Tactics Plan Overview
• Tactics Grid
• Relative Interaction Value Numbers Grid
• Interaction system flow for
• Acquisition
• Closing
• Retention
390
Anticipating Reports
380

FIG. 15/62



ACCESS



STRATIX
Relationship
Tracking
System

© 2001 STRATIX™
Patent Pending

Login Name: _____

Password: _____



394



396

392

FIG. 16/62





PRIORITY ACTION

410 Interaction

412 Priority Action

414 Search Contact

416 Add Contact

418 Add Relationship

420 Reports

422 Utility



STRATIX
Relationship Tracking System

© 2001 STRATIX™
Patent Pending

Planned Interactions 402

Go To	Interaction Date	Interaction	Contact	Company	Phone	CEL#
▲	02-17-01	A2-2 Attempt Call	Mary Meu	Lily Corporation	800-123-4567	1.180
▲	02-17-01	A2-7 Ongoing Thank Yous	N.T. Palm	FishTail Company	888-321-7654	4.000

Past Due Interactions 404

Go To	Interaction Date	Interaction	Contact	Company	Phone	CEL#
▲	01-31-01	A2-2 Attempt Call	Percy Resque	Floraluv	800-109-8765	2.040



400

FIG. 17/62



N.T. Palm
CTO
888-321-7654
ntpalm@fishtail.com
x_ Email Permission

FishTail Company
One Green Street
Suite 17
San Francisco CA 94123
CEL# 4.000



INTERACTION

Interaction
Priority Action
Search Contact
Add Contact
Add Relationship

Reports
Utility



STRATIX
Relationship Tracking System

© 2001 STRATIX™
Patent Pending

Select Contact Information | Select Profiling Questions | Select Knowledge Screening

Choose From | Choose From | Choose From

Planned Interaction

Date	Interaction
02-17-01	A2-7 Ongoing Thank Yous

EDIT

Current Interaction

User	Date	Interaction	Response
		Choose From	Choose From

Notes

ADD

Next Interaction Date	Next Interaction
	Choose From

REPLACE

Interaction Record

FIG. 18/62

426

User Edit	Date	Interaction	Response	CEL#	Notes
LSharp	02-16-01	A2-6 Live Conversation	A2-6dd Hand Off In Person Appt.	4.000	Eager to meet. Will have an hour maximum. No one else in meeting.
LSharp	02-16-01	A2-3 Leave Voice Mail #2		2.000	
	02-13-01	A1-5 4th Postcard		1.180	
LSharp	02-07-01	A2-1 Leave Voice Mail #1		1.150	
	02-07-01	A1-4 Brochure		1.120	
	02-01-01	A1-3 3rd Postcard		1.090	
	01-24-01	A1-2 2nd Postcard		1.060	
	01-18-01	Al-1 1st Postcard		1.030	

FIG. 19/62

430



FIG. 20/62

440





SEARCH CONTACT

Interaction

Priority Action

Search Contact

Add Contact

Add Relationship

Reports

Utility



STRATIX
Relationship Tracking System

© 2001 STRATIX™
Patent Pending

Sort Database By

1st Search Parameter | 2nd Search Parameter | 3rd Search Parameter

SORT

Select Contact From Sorted Database — Select a Contact

GO TO

Search Contact By:

	Minimum	Maximum
CEL#		
Last Interaction Date	02-12-01	02-16-01
Planned Interaction Date	02-25-01	03-01-01
First Name		
Last Name		
Company	Plants Unlimited	

SEARCH

Select Contact From Search-Filtered Database — Select a Contact

GO TO



460

FIG. 21/62



Herbert Ficus
CEO
800-456-7890
hficus@plantsunlimited.com
x_ Email Permission

Plants Unlimited
17 Green Street
Suite 100
San Francisco CA 94123
CEL# 5.475



INTERACTION

Interaction
Priority Action
Search Contact
Add Contact
Add Relationship

Reports
Utility



STRATIX
Relationship Tracking System

© 2001 STRATIX™
Patent Pending

Select Contact Information | Select Profiling Questions | Select Knowledge Screening

Choose From | Choose From | Choose From

Planned Interaction

Date	Interaction
02-21-01	C4-7 Follow Up Initial Contract

EDIT

Current Interaction

User	Date	Interaction	Response
		Choose From: C4-7 Follow Up Initial Contract	C4-7a Left Voice Mail

Notes

ADD

Next Interaction Date	Next Interaction
02-26-01	Choose From: C4-7 Follow Up Initial Contract

REPLACE

Interaction Record



500

FIG. 22/62

User Edit	Date	Interaction	Response	CEL	Notes
Npatel	2/16/01	C4-4 Thank You For Contract	C4-4a Thank You Note	5.475	Will check back 2/21.
Npatel	2/15/01	C4-3 Deliver Premium Contract		5.355	Just what Herbert wanted. Will take a couple of weeks to get through Legal.
Npatel	2/10/01	C4-1 Set Initial Contract Meeting		5.205	Will only have 30 minutes.
Npatel	2/5/01	C3-9 Thank You Follow Up	C3-9b Thank You Email	5.130	Thanks for getting answers needed.
	2/4/01	A4-1 Monthly Email Tip		5.040	
Npatel	2/4/01	C3-8 Follow Up Meeting Initial Proposal	C3-8t WANTS A CONTRACT!	5.000	The kicker was our track record and comfort level.
Npatel	2/1/01	C3-7 Follow Up Initial Proposal	C3-7l Set Follow Up Meeting	4.999	Needs others to agree.
Npatel	1/25/01	C3-4 Thank You For Initial Proposal	C3-4a Thank You Note	4.999	
Npatel	1/24/01	C3-3 Deliver Premium Initial Proposal		4.999	Feels good.
Npatel					

FIG. 23/62

510

	1/20/01	C3-1 Set Initial Proposal Meeting		4.895	
Npatel	1/15/01	C2-7 Thank You For Facts	C2-7b Thank You Email	4.820	
Npatel	1/14/01	C2-5 Meeting On Facts	C2-5d Our Facts Have Enough	4.730	
Npatel	1/12/01	C2-4 Set Meeting Confirm Facts		4.680	
Npatel	1/10/01	C2-3 Premium Fact Finding		4.605	Very cooperative.
Npatel	1/9/01	C2-1 Follow Up Fact Finding	C2-1i Set Meeting To Get Facts	4.455	Doesn't have time to do on own afterall. Wants us to do.
Npatel	1/4/01	C1-2 Thank You For Appointment	C1-2a Thank You Note	4.380	Offered to get facts, if need be.
Npatel	1/3/01	C1-1 Initial Appointment	C1-1bb Customer To Develop Facts	4.260	Wants to do as much as they can, thinks will be faster.
Npatel	1/2/01	A4-1 Monthly Email Tip		4.210	
Npatel	1/2/01	C1-1 Initial Appointment	C1-1a Confirm Appointment	4.170	
Lsharp	12/21/00	A2-7 Ongoing Thank Yous	A2-7a Thank You Note	4.120	Reminded name of person who will come to see.
Lsharp					

520

FIG. 24/62

	12/21/00	A2-6 Live Conversation	A2-6dd Hand Off In Person Appt.	4.000	Has a go ahead from others.
Lsharp	12/20/00	A2-6 Live Conversation	A2-6a Call Back 12/21/00	2.080	Doesn't have feedback yet on email.
Lsharp	12/19/00	A2-6 Live Conversation	A2-6d Send Why XYZ Company Email	2.040	Wants to send to others.
Lsharp	12/17/00	A2-1 Leave Voice Mail #1		1.150	
	12/17/00	A1-4 Brochure		1.120	
	12/10/00	A1-3 3rd Postcard		1.090	
	12/3/00	A1-2 2nd Postcard		1.060	
	11/25/00	A1-1 1st Postcard		1.030	



FIG. 25/62

530

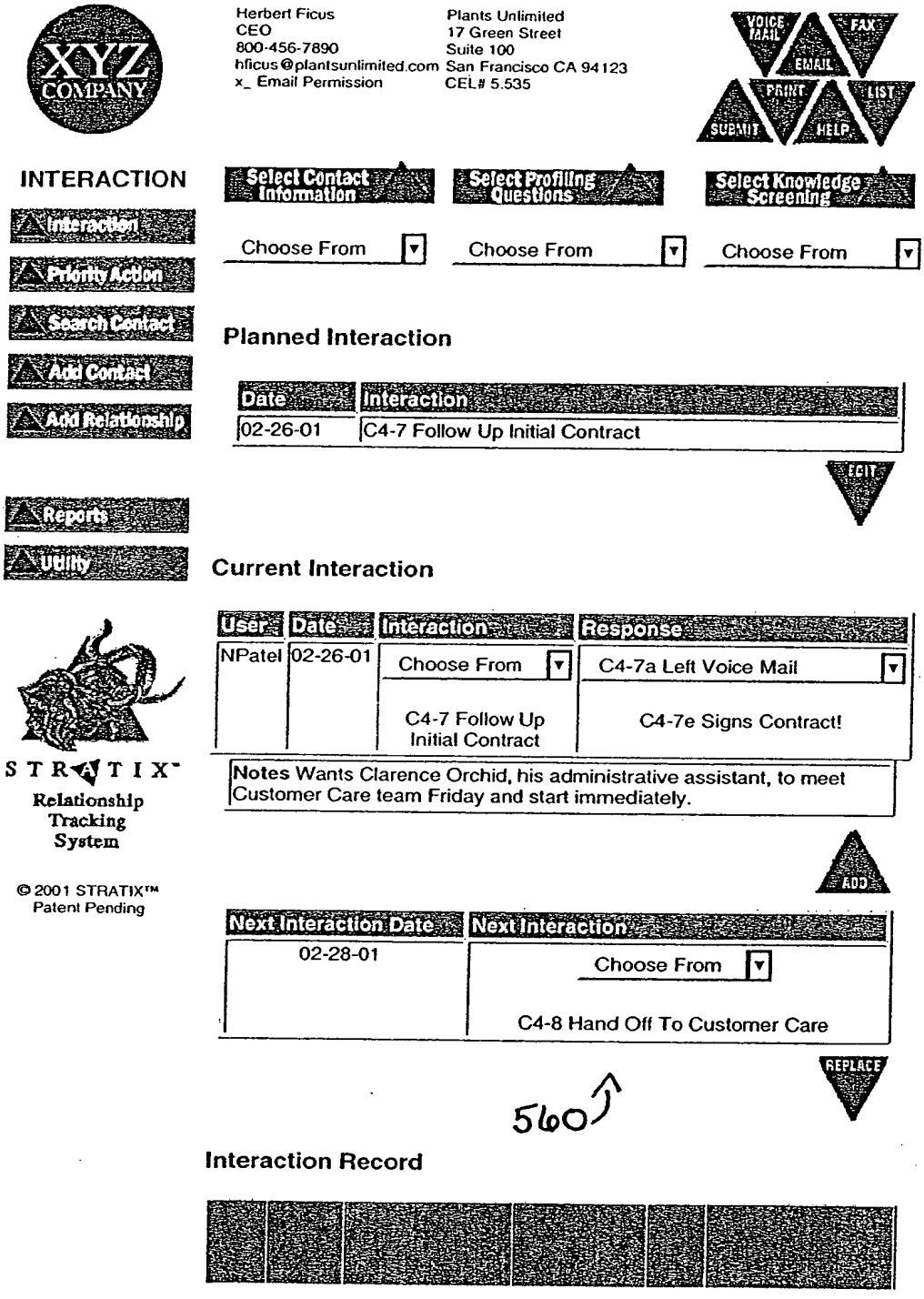

XYZ COMPANY
Herbert Ficus
CEO
800-456-7890
hficus@plantsunlimited.com
x_ Email Permission
Plants Unlimited
17 Green Street
Suite 100
San Francisco CA 94123
CEL# 5.535
VOICE MAIL
FAX
EMAIL
PRINT
LIST
SUBMIT
HELP
INTERACTION
Interaction
Priority Action
Search Contact
Add Contact
Add Relationship
Reports
Utility
Select Contact Information
Select Profiling Questions
Select Knowledge Screening
Choose From
Choose From
Choose From
Planned Interaction
Date
Interaction
02-26-01
C4-7 Follow Up Initial Contract
EDIT
Current Interaction
User
Date
Interaction
Response
NPatel
02-26-01
Choose From
C4-7 Follow Up Initial Contract
C4-7a Left Voice Mail
C4-7e Signs Contract!
Notes Wants Clarence Orchid, his administrative assistant, to meet Customer Care team Friday and start immediately.
ADD
STRATIX
Relationship Tracking System
© 2001 STRATIX™
Patent Pending
Next Interaction Date
Next Interaction
02-28-01
Choose From
C4-8 Hand Off To Customer Care
REPLACE
560
Interaction Record

FIG. 26/62

User Edit	Date	Interaction	Response	CEL#	Notes
Npatel	2/21/01	C4-7 Follow Up Initial Contract	C4-7a Left Voice Mail	5.535	
Npatel	2/16/01	C4-4 Thank You For Contract	C4-4a Thank You Note	5.475	Will check back 2/21.
Npatel	2/15/01	C4-3 Deliver Premium Contract		5.355	Just what Herbert wanted. Will take a couple of weeks to get through Legal.
Npatel	2/10/01	C4-1 Set Initial Contract Meeting		5.205	Will only have 30 minutes.
Npatel	2/5/01	C3-9 Thank You Follow Up	C3-9b Thank You Email	5.130	Thanks for getting answers needed.
	2/4/01	A4-1 Monthly Email Tip		5.040	
Npatel	2/4/01	C3-8 Follow Up Meeting Initial Proposal	C3-8t WANTS A CONTRACT!	5.000	The kicker was our track record and comfort level.
Npatel	2/1/01	C3-7 Follow Up Initial Proposal	C3-7l Set Follow Up Meeting	4.999	Needs others to agree.
Npatel	1/25/01	C3-4 Thank You For Initial Proposal	C3-4a Thank You Note	4.999	

570

FIG. 27/62

Npatel	1/24/01	C3-3 Deliver Premium Initial Proposal		4.999	Feels good.
Npatel	1/20/01	C3-1 Set Initial Proposal Meeting		4.895	
Npatel	1/15/01	C2-7 Thank You For Facts	C2-7b Thank You Email	4.820	
Npatel	1/14/01	C2-5 Meeting On Facts	C2-5d Our Facts Have Enough	4.730	
Npatel	1/12/01	C2-4 Set Meeting Confirm Facts		4.680	
Npatel	1/10/01	C2-3 Premium Fact Finding		4.605	Very cooperative.
Npatel	1/9/01	C2-1 Follow Up Fact Finding	C2-1i Set Meeting To Get Facts	4.455	Doesn't have time to do on own afterall. Wants us to do.
Npatel	1/4/01	C1-2 Thank You For Appointment	C1-2a Thank You Note	4.380	Offered to get facts, if need be.
Npatel	1/3/01	C1-1 Initial Appointment	C1-1bb Customer To Develop Facts	4.260	Wants to do as much as they can, thinks will be faster.
Npatel	1/2/01	A4-1 Monthly Email Tip		4.210	

580

FIG. 28/62

Npatel	1/2/01	C1-1 Initial Appointment	C1-1a Confirm Appointment	4.170	
Lsharp	12/21/00	A2-7 Ongoing Thank Yous	A2-7a Thank You Note	4.120	Reminded name of person who will come to see.
Lsharp	12/21/00	A2-6 Live Conversation	A2-6dd Hand Off In Person Appt.	4.000	Has a go ahead from others.
Lsharp	12/20/00	A2-6 Live Conversation	A2-6a Call Back 12/21/00	2.080	Doesn't have feedback yet on email.
Lsharp	12/19/00	A2-6 Live Conversation	A2-6d Send Why XYZ Company Email	2.040	Wants to send to others.
Lsharp	12/17/00	A2-1 Leave Voice Mail #1		1.150	
	12/17/00	A1-4 Brochure		1.120	
	12/10/00	A1-3 3rd Postcard		1.090	
	12/3/00	A1-2 2nd Postcard		1.060	
	11/25/00	A1-1 1st Postcard		1.030	

FIG. 29/62

590



FIG. 30/62

600

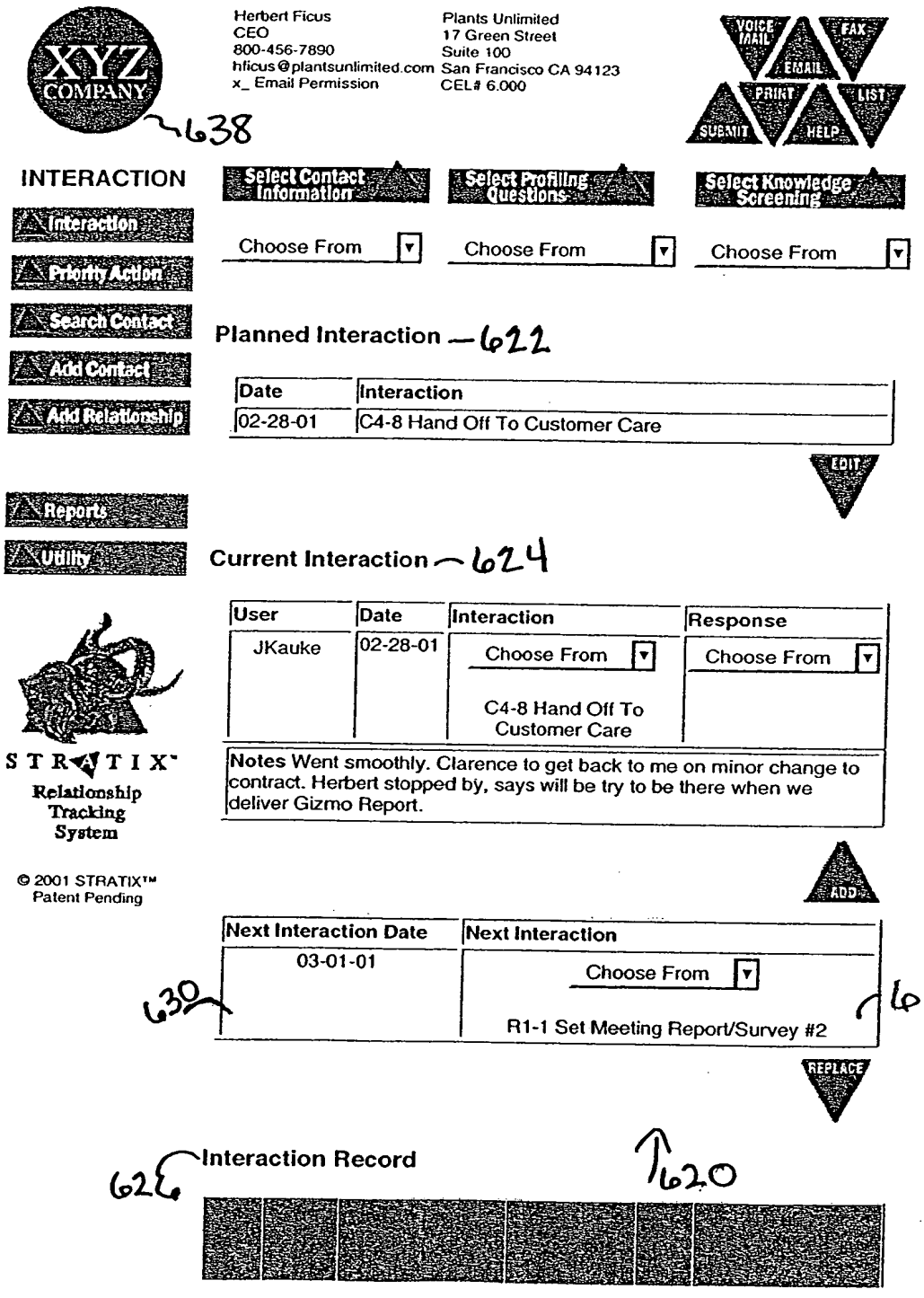
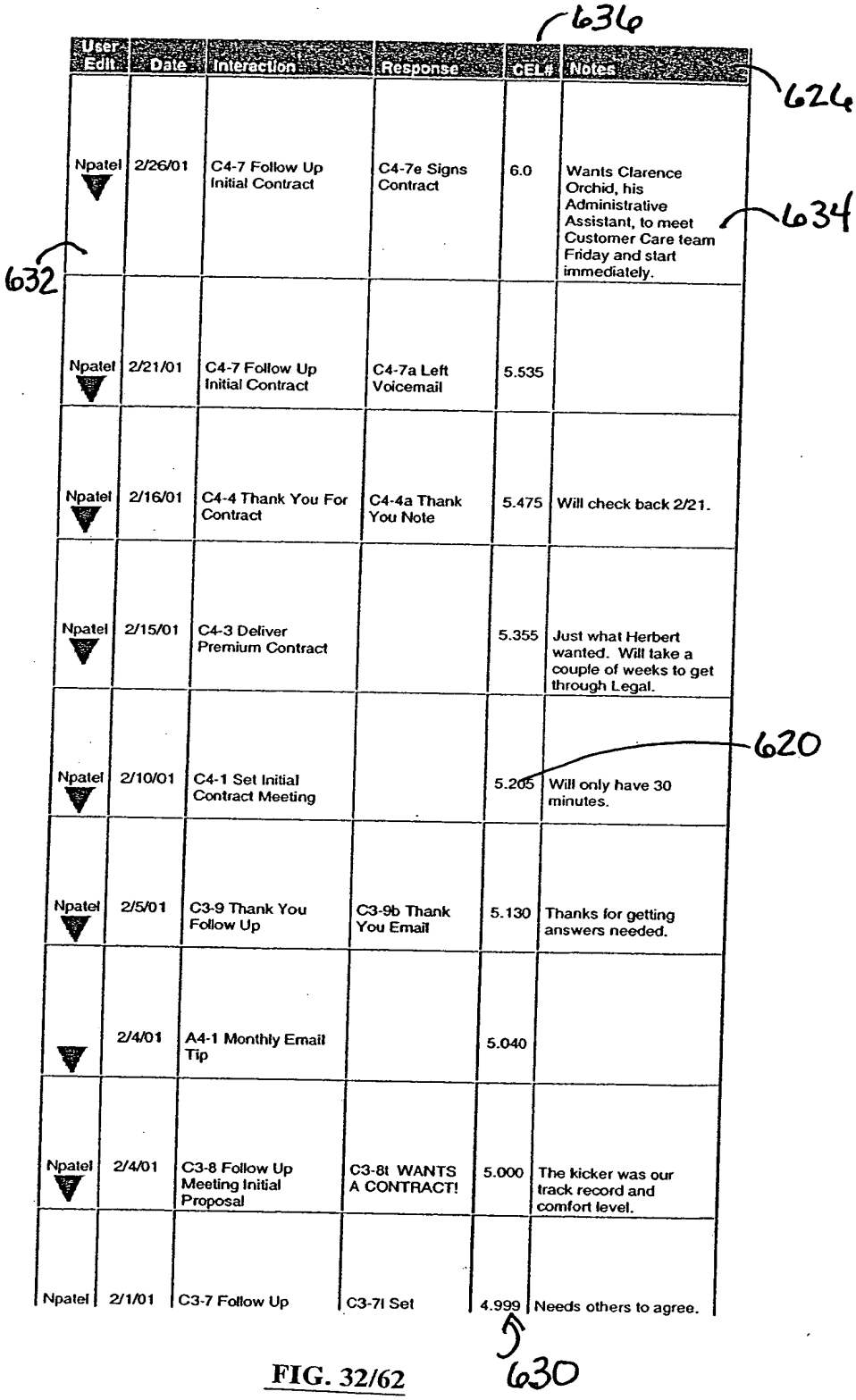

XYZ COMPANY
638
Herbert Ficus
CEO
800-456-7890
hficus@plantsunlimited.com
x_ Email Permission
Plants Unlimited
17 Green Street
Suite 100
San Francisco CA 94123
CEL# 6.000
VOICE MAIL
FAX
EMAIL
PRINT
LIST
SUBMIT
HELP
INTERACTION
Select Contact Information
Select Profiling Questions
Select Knowledge Screening
Interaction
Priority Action
Search Contact
Add Contact
Add Relationship
Reports
Utility
Choose From
Choose From
Choose From
Planned Interaction
622
Date
Interaction
02-28-01
C4-8 Hand Off To Customer Care
EDIT
Current Interaction
624
User
Date
Interaction
Response
JKauke
02-28-01
Choose From
Choose From
C4-8 Hand Off To Customer Care
Notes Went smoothly. Clarence to get back to me on minor change to contract. Herbert stopped by, says will be try to be there when we deliver Gizmo Report.
ADD
STRATIX
Relationship Tracking System
© 2001 STRATIX™
Patent Pending
Next Interaction Date
Next Interaction
03-01-01
Choose From
R1-1 Set Meeting Report/Survey #2
630
628
REPLACE
626
Interaction Record
620

FIG. 31/62



User Edit	Date	Interaction	Response	CEL#	Notes
Npatel	2/26/01	C4-7 Follow Up Initial Contract	C4-7e Signs Contract	6.0	Wants Clarence Orchid, his Administrative Assistant, to meet Customer Care team Friday and start immediately.
Npatel	2/21/01	C4-7 Follow Up Initial Contract	C4-7a Left Voicemail	5.535	
Npatel	2/16/01	C4-4 Thank You For Contract	C4-4a Thank You Note	5.475	Will check back 2/21.
Npatel	2/15/01	C4-3 Deliver Premium Contract		5.355	Just what Herbert wanted. Will take a couple of weeks to get through Legal.
Npatel	2/10/01	C4-1 Set Initial Contract Meeting		5.205	Will only have 30 minutes.
Npatel	2/5/01	C3-9 Thank You Follow Up	C3-9b Thank You Email	5.130	Thanks for getting answers needed.
	2/4/01	A4-1 Monthly Email Tip		5.040	
Npatel	2/4/01	C3-8 Follow Up Meeting Initial Proposal	C3-8t WANTS A CONTRACT!	5.000	The kicker was our track record and comfort level.
Npatel	2/1/01	C3-7 Follow Up	C3-7l Set	4.999	Needs others to agree.

FIG. 32/62

		Initial Proposal	Follow Up Meeting		
Npatel	1/25/01	C3-4 Thank You For Initial Proposal	C3-4a Thank You Note	4.999	
Npatel	1/24/01	C3-3 Deliver Premium Initial Proposal		4.999	Feels good.
Npatel	1/20/01	C3-1 Set Initial Proposal Meeting		4.895	
Npatel	1/15/01	C2-7 Thank You For Facts	C2-7b Thank You Email	4.820	
Npatel	1/14/01	C2-5 Meeting On Facts	C2-5d Our Facts Have Enough	4.730	
Npatel	1/12/01	C2-4 Set Meeting Confirm Facts		4.680	
Npatel	1/10/01	C2-3 Premium Fact Finding		4.605	Very cooperative.
Npatel	1/9/01	C2-1 Follow Up Fact Finding	C2-1i Set Meeting To Get Facts	4.455	Doesn't have time to do on own afterall. Wants us to do.
Npatel	1/4/01	C1-2 Thank You For Appointment	C1-2a Thank You Note	4.380	Offered to get facts, if need be.

FIG. 33/62

640

Npatel	1/3/01	C1-1 Initial Appointment	C1-1bb Customer To Develop Facts	4.260	Wants to do as much as they can, thinks will be faster.
	1/2/01	A4-1 Monthly Email Tip		4.210	
Npatel	1/2/01	C1-1 Initial Appointment	C1-1a Confirm Appointment	4.170	
Lsharp	12/21/00	A2-7 Ongoing Thank Yous	A2-7a Thank You Note	4.120	Reminded name of person who will come to see.
Lsharp	12/21/00	A2-6 Live Conversation	A2-6dd Hand Off In Person Appt.	4.000	Has a go ahead from others.
Lsharp	12/20/00	A2-6 Live Conversation	A2-6a Call Back 12/21/00	2.080	Doesn't have feedback yet on email.
Lsharp	12/19/00	A2-6 Live Conversation	A2-6d Send Why XYZ Company Email	2.040	Wants to send to others.
Lsharp	12/17/00	A2-1 Leave Voice Mail #1		1.150	
	12/17/00	A1-4 Brochure		1.120	
	12/10/00	A1-3 3rd Postcard		1.090	

FIG. 34/62

650

▼	12/3/00	A1-2 2nd Postcard		1.060	
▼	11/25/00	A1-1 1st Postcard		1.030	



FIG. 35/62

6660

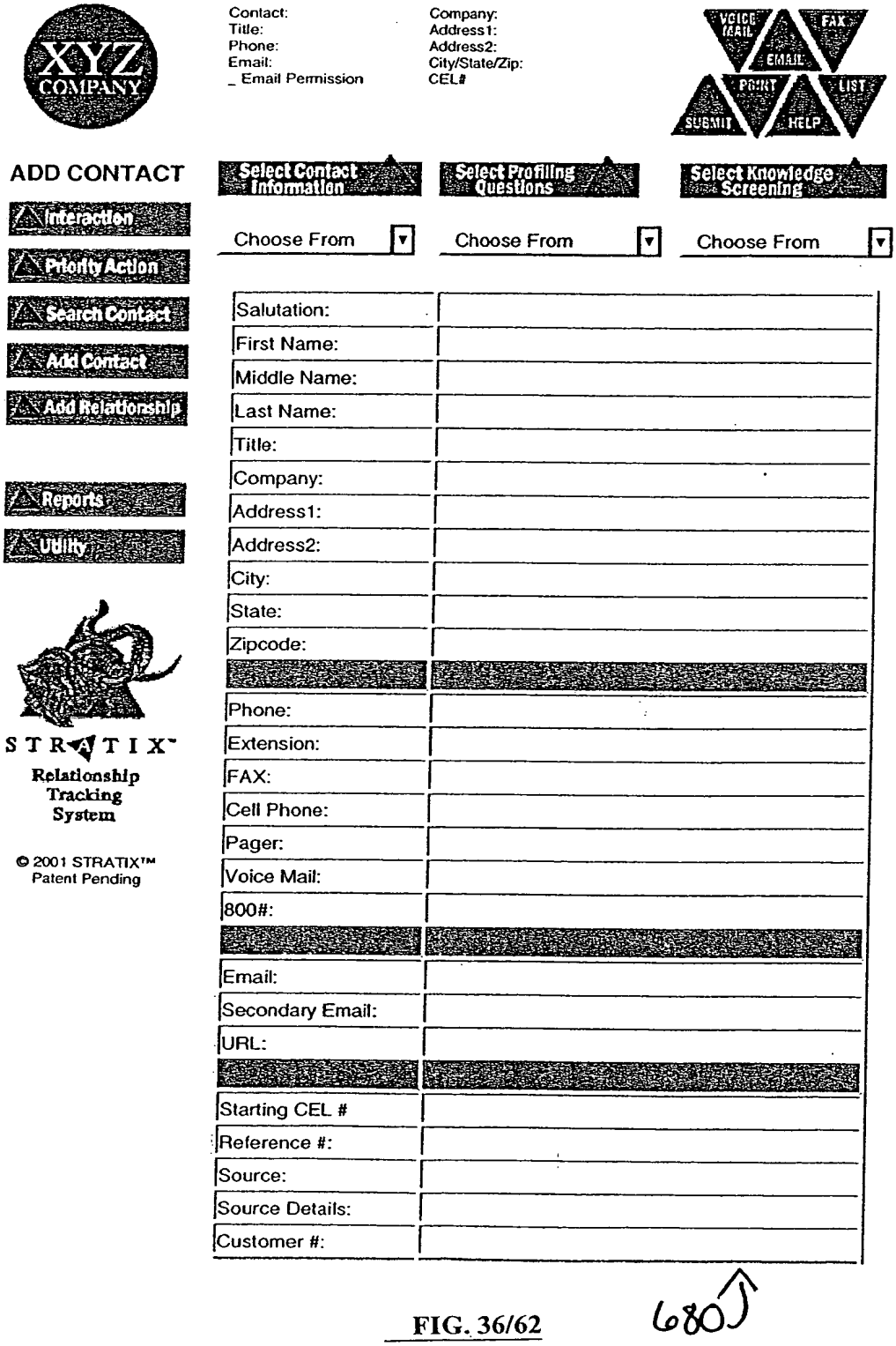

XYZ COMPANY
Contact:
Title:
Phone:
Email:
_ Email Permission
Company:
Address1:
Address2:
City/State/Zip:
CEL#
VOICE MAIL
FAX
EMAIL
PRINT
LIST
SUBMIT
HELP
ADD CONTACT
Interaction
Priority Action
Search Contact
Add Contact
Add Relationship
Reports
Utility
STRATIX
Relationship Tracking System
© 2001 STRATIX™ Patent Pending
Select Contact Information
Select Profiling Questions
Select Knowledge Screening
Choose From
Choose From
Choose From
Salutation:
First Name:
Middle Name:
Last Name:
Title:
Company:
Address1:
Address2:
City:
State:
Zipcode:
Phone:
Extension:
FAX:
Cell Phone:
Pager:
Voice Mail:
800#:
Email:
Secondary Email:
URL:
Starting CEL #
Reference #:
Source:
Source Details:
Customer #:

FIG. 36/62

680

Prefers Reach Via:	
On job (years)	
As (title) (years)	
Gender:	
Delivery Team:	
Alternative Address1:	
Alternative Address2:	
Alternative City:	
Alternative State:	
Alternative Zipcode:	



FIG. 37/62

130



Herbert Ficus
CEO
800-456-7890
hficus@plantsunlimited.com
x_ Email Permission

Plants Unlimited
17 Green Street
Suite 100
San Francisco, CA 94123
CEL# 6.000



CONTACT INFORMATION COMPANY DATA

Interaction
Priority Action
Search Contact
Add Contact
Add Relationship

Reports
Utility



STRATIX
Relationship Tracking System

© 2001 STRATIX™
Patent Pending

Select Contact Information | Select Profiling Questions | Select Knowledge Screening

Choose From | Choose From | Choose From

Salutation:	Mr.
First Name:	Herbert
Middle Name:	T
Last Name:	Ficus
Title:	CEO
Company:	Plants Unlimited
Address1:	17 Green Street
Address2:	Suite 100
City:	San Francisco
State:	CA
Zipcode:	94123
Phone:	415 456 7890
Extension:	
FAX:	
Cell Phone:	
Pager:	
Voice Mail:	
800#:	456 7890
Email:	hficus@plantsunlimited.com
Secondary Email:	
URL:	www.plantsunlimited.com
Starting CEL #	1.000
Reference #:	CA Test 1
Source:	List A, Telemarketing
Source Details:	Terrific Lists
Customer #:	

780

FIG. 38/62

Prefers Reach Via:	Email
On job (years)	25
As (title) (years)	CEO, 20
Gender:	
Age:	25
Delivery Team:	LSharp, Npatel, JKauke
Alternative Address1:	
Alternative Address2:	
Alternative City:	
Alternative State:	
Alternative Zipcode:	



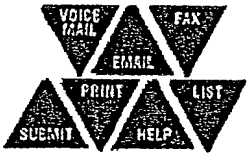
800

FIG. 39/62



Herbert Ficus
CEO
800-456-7890
hficus@plantsunlimited.com
x_ Email Permission

Plants Unlimited
17 Green Street
Suite 100
San Francisco CA 94123
CEL# 6.000#



CONTACT INFORMATION PERSONAL DATA

Interaction
Priority Action
Search Contact
Add Contact
Add Relationship

Reports
Utility



STRATIX™
Relationship Tracking System

© 2001 STRATIX™
Patent Pending

Select Contact Information | Select Profiling Questions | Select Knowledge Screening

Choose From | Choose From | Choose From

Home Address1:	
Home Address2:	
Home City:	
Home State:	
Home Zip code:	
Home Phone:	
Home FAX:	
Home Cell	
Phone:	
Home Voice	
Mail:	
Home Pager:	
Home Email:	
URL:	
Referral Source:	
Referral Details	
Affinity	
Organization:	
Cause:	CNPS
Person:	
Other:	
Special Interests	
Hobbies:	
Sports:	
Activities:	
Culture:	
Music:	Jazz
Food:	
Drink:	Water
Other	

FIG. 40/62

830

Personal	
Spouse:	
Significant Other:	
Child:	
Other relative:	
Friend:	Jacob Bills
Pet:	Sierra Cat
Birthday	00/00/00



FIG. 41/62

860



Herbert Ficus
CEO
800-456-7890
hficus@plantsunlimited.com
x_ Email Permission

Plants Unlimited
17 Green Street
Suite 100
San Francisco CA 94123
CEL# 6.000



CONTACT INFORMATION RELATIONSHIPS

Interaction
Priority Action
Search Contact
Add Contact
Add Relationship

Reports
Utility

Select Contact Information | Select Profiling Questions | Select Knowledge Screening

Choose From | Choose From | Choose From

Go To	Contact	Title	City	Phone	Relationship	CEL#
▲	Hope Blooms	CFO	San Francisco	800-456-7890	Influencer	4.999
▲	Gratze White	Chairman	San Francisco	800-456-7890	Boss	4.999
▲	Tom Paz-ion	Engineer	Los Angeles	888-725-4444	None	2.040
▲	Nielson Love	COO	San Francisco	800-456-7890	Unknown	1.000
▲	Jill O'Joy	Manager	San Francisco	800-456-7890	Billing	6.000
▲	Fred Ready	Foreman	San Francisco	800-456-7890	Receiving	6.000
▲	Clarence Orchid	Aide	San Francisco	800-456-7890	Assistant	6.000



STRATIX
Relationship Tracking System

© 2001 STRATIX™
Patent Pending



FIG. 42/62

890

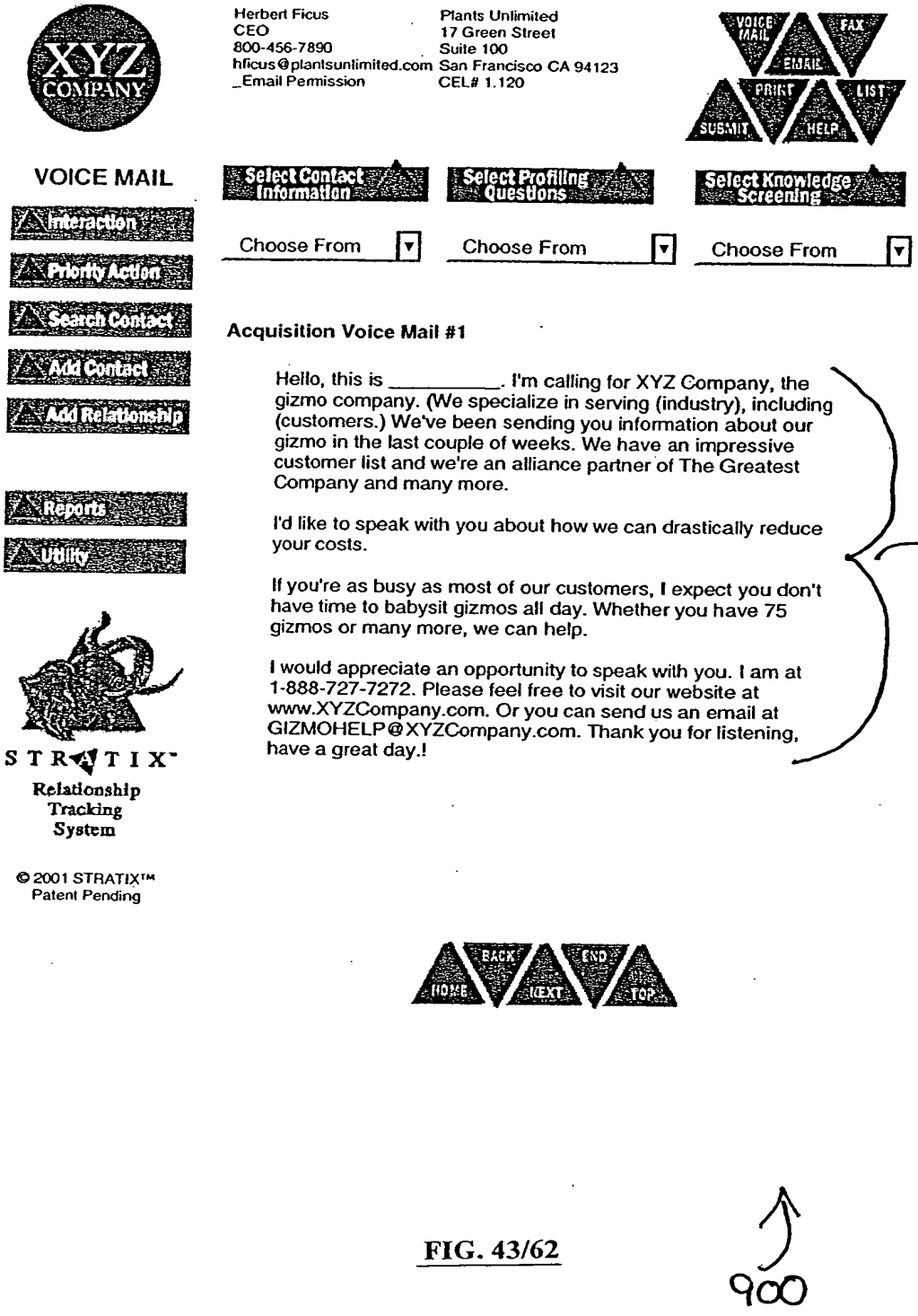

XYZ COMPANY
Herbert Ficus
CEO
800-456-7890
hficus@plantsunlimited.com
_Email Permission
Plants Unlimited
17 Green Street
Suite 100
San Francisco CA 94123
CEL# 1.120
VOICE MAIL
FAX
EMAIL
PRINT
LIST
SUBMIT
HELP
VOICE MAIL
Select Contact Information
Select Profiling Questions
Select Knowledge Screening
Choose From
Choose From
Choose From
Interaction
Priority Action
Search Contact
Add Contact
Add Relationship
Reports
Utility
STRATIX
Relationship Tracking System
© 2001 STRATIX™
Patent Pending
Acquisition Voice Mail #1
Hello, this is _____. I'm calling for XYZ Company, the gizmo company. (We specialize in serving (industry), including (customers.) We've been sending you information about our gizmo in the last couple of weeks. We have an impressive customer list and we're an alliance partner of The Greatest Company and many more.
I'd like to speak with you about how we can drastically reduce your costs.
If you're as busy as most of our customers, I expect you don't have time to babysit gizmos all day. Whether you have 75 gizmos or many more, we can help.
I would appreciate an opportunity to speak with you. I am at 1-888-727-7272. Please feel free to visit our website at www.XYZCompany.com. Or you can send us an email at GIZMOHELP@XYZCompany.com. Thank you for listening, have a great day.!
902
HOME
BACK
NEXT
END
TOP
900

FIG. 43/62



Herbert Ficus
CEO
800-456-7890
hficus@plantsunlimited.com
_Email Permission

Plants Unlimited
17 Green Street
Suite 100
San Francisco CA 94123
CEL# 1.150



PROFILING QUESTIONS ACQUISITION

Interaction
Priority Action
Search Contact
Add Contact
Add Relationship
Reports
Utility



STRATIX
Relationship Tracking System

© 2001 STRATIX™
Patent Pending

Select Contact Information | Select Profiling Questions | Select Knowledge Screening

Choose From | Choose From | Choose From

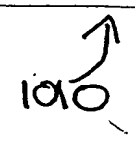
First Outbound Telemarketing Script:	
Hello, I'm _____ with XYZ Company, the gizmo company. (We specialize in serving (industry), including (customers.) We sent you the purple gizmo brochure. (Are the person people call for gizmos? Do you have more than 75 gizmos in your operation?	175
IF NO, GO TO "NOT QUALIFIED CLOSE" AT END OF SCRIPT.	
IF YES, CONTINUE: That's good, then we could drastically cut your downtime, perhaps by as much as 66%. And reduce your costs. Our customers tell us they save up to 25%. We're an alliance partner of The Greatest Company. We offer one stop shopping for all your gizmo needs, everything you need from one source. Does this make sense to you?	
IF ANXIOUS TO GET OFF: At the very least, we would appreciate the privilege of sending you more information via email. With your permission we would like to follow up within a week or two after you have looked at the material. Perhaps then you will be able to make an intelligent choice about making an appointment to see one of our representatives. Does this seem reasonable to you? May I have your email address, please? (IF ALREADY HAVE IT, CONFIRM IT.)	
*****SEND "WHY XYZ COMPANY EMAIL." *****PUT ON EMAIL LIST. (YES/NO)	
What would be a better day to follow up? Would (Thursday or Friday) of next week be best? *****SET CALLBACK DATE AND TIME	
IF NOT ANXIOUS TO GET OFF: Then I have a few questions that might help us both decide if there is a fit.	
(Critical to get gizmo count and to set appointment. Try to get email permission if don't have it already	
1. How many gizmos do you have? (NEEDS TO BE MORE THAN 75. If you have a figure confirm it.)	175

FIG. 44/62

1000

IF NO: Do you plan to add more gizmos soon? IF STILL NO, GO TO "NOT QUALIFIED CLOSE" AT END OF SCRIPT.	
IF YES, CONTINUE:	
2. Is it important that you have gizmos? (YES/NO) How important is it-on a scale of 1 to 5 with 5 being really important? (ANSWER HAS TO BE 3 TO 5. IF LESS THAN 3, GO TO "NOT QUALIFIED CLOSE" AT END OF SCRIPT.)	5
3. What would you say the complaint level is on what you have to deal with-on a scale of 1 to 5 with 5 being really bad? (ANSWER HAS TO BE 3 TO 5. IF LESS THAN 3, GO TO "NOT QUALIFIED CLOSE" AT END OF SCRIPT.)	5
4. What about gizmo use? Is it high or low-on a scale of 1 to 5 with 5 being really high? (ANSWER HAS TO BE 3 TO 5. IF LESS THAN 3, GO TO "NOT QUALIFIED CLOSE" AT END OF SCRIPT.)	5
5. How are you handling the situation now? Are you doing it yourselves or do you have a contract? (THEMSELVES IS A GO NOW.)	Themselves
6. If a contract: What is the contract for? (LIMITED CONTRACT IS GOOD.)	
(Wherever you stop in questions #1-6, assuming they have given the right answers):	
7. It sounds like we might have a fit. I'd like to set up an appointment. When would work best for you? (Details on who the appointment will be with, etc.)	Wants Why XYZ Company email first.
*****SET APPOINTMENT DATE AND TIME	
*****SET CALL BACK TIME	12/21/00
*****DON'T DO IF YOU HAVE ALREADY DONE THIS!!! IF YOU SENT THE WHY XYZ COMPANY EMAIL, YOU HAVE DONE THIS!!!	
8. I'd like to put you on our email list so we can send you tips about gizmos. May I get your email address? (Or confirm it, if you have it.)	hficus @ PlantsUnlimited.com
*****PUT ON EMAIL LIST. (YES/NO)	Yes
*****SEND FIRST EMAIL TIP (YES/NO)	
*****SEND WHY XYZ COMPANY (YES/NO)	Yes
9. Just curious. Had (or have) you heard of XYZ Company before? *****HEARD OF XYZ Company (Unaware, Aided Aware, Aware)	Aided Aware

FIG. 45/62



QUALIFIED CLOSE: Either I know _____ will look forward to meeting with you. Or We look forward to meeting with you when the time is right and in the meantime, you'll get our gizmo email tips. You may want to visit our Web site at www.XYZCompany.com. Thank you for your time.	
NOT QUALIFIED CLOSE: Our contract only makes sense for companies with more than 75 gizmos, so I'm afraid this would not be worth your time right now. May I check back with you in the future?	
*****CHECK BACK IN FUTURE (YES/NO)	
*****AT END OF CALL CHOSE RIGHT CALL RESPONSE AND TAKE ACTION TO FULFILL COMMITMENTS TO CONTACT.	
Assess quality of contact as influencer on Scale 1 to 5 with 5 being top for:	
External	
Internal	
*****CONFIRM CONTACT INFORMATION.	



FIG. 46/62

1020



Herbert Ficus
CEO
800-456-7890
hficus@plantsunlimited.com
x Email Permission

Plants Unlimited
17 Green Street
Suite 100
San Francisco CA 94123
CEL# 4.000



PROFILING QUESTIONS CLOSING

Interaction
Priority Action
Search Contact
Add Contact
Add Relationship

Reports
Utility



STRATIX
Relationship Tracking System

© 2001 STRATIX™
Patent Pending

Select Contact Information | Select Profiling Questions | Select Knowledge Screening

Choose From | Choose From | Choose From

Ongoing Closing Questionnaire:	
1. Most common complaints about gizmos?	
2. How long have you been on the job?	25 years
3. How long has your company been in business?	25 years
4. What is your revenue? ____actual or range:	$100-500 million
5. Type of business?	
6. How many locations?	3
7. Yours is the ____, right?	Headquarters
8. You have between _____ number of people now, right?	1,000-4,999
9. Growth expectations over the next year in terms of people? _____%	
10. I have these names of others in your company who would be involved in contracting for gizmos _____. Tell me about them and their role. What is the process to get a contract signed in your organization? What can you do to move the process along? (Probe on the next steps.) Can you carry the ball on this or do we need to meet with some of the other people?	
11. We need a signed contract, the first payment and a purchase order a week prior to the start. When can we start? Set a realistic start date. Working backwards from that date organize getting the information needed to do a proposal.	03/01/00
12. Note competition if any.	ABC Company
13. Set closing status (A This month, B In next days, C In next 60 days)	
14. Once a signed contract:	
a. Note: Contract length:	3 years
Yearly revenue:	$35,000
Monthly revenue:	2,917
# of locations under contract	1
b. Get an XYZ Company internal customer # assigned.	

FIG. 47/62

1030

c. Determine Customer Lifetime Value (CLV) potential	
d. Set time to bring in Customer Care people to meet with their key staff members.	
15. After each encounter with person,	
a. Set closing priority. (Scale 1 to 5 with 5 being top.)	5
b. Determine revenue potential on scale 1 to 5 with 5 being top for Up Sell Cross sell Increase Volume	
c. Assess quality of contact as influencer on scale 1 to 5 with 5 being top for External Internal	
d. Assess Awareness Level for attitude towards purchase (Consideration, Intended).	
e. Categorize Attitude on scale 1 to 5 with 5 being top for Embracing Attitude Overcoming Attitude	
f. Add to Contact Information.	



FIG. 48/62

1040



Herbert Ficus
CEO
800-456-7890
hficus@plantsunlimited.com
X Email Permission

Plants Unlimited
17 Green Street
Suite 100
San Francisco CA 94123
CEL# 7.000



PROFILING QUESTIONS RETENTION

Interaction
Priority Action
Search Contact
Add Contact
Add Relationship
Reports
Utility



STRATIX
Relationship Tracking System

©2001 STRATIX™
Patent Pending

Select Contact Information | Select Profiling Questions | Select Knowledge Screening

Choose From | Choose From | Choose From

Ongoing Retention Questionnaire	
1. Most common gizmos?	
2. Who decides the type of gizmo to purchase within the organization?	
3. Any cultural issues regarding gizmos?	
4. Number of people employed at specific locations?	
5. Number of gizmos per location?	
6. Any changes in locations planned?	
7. Any specialist departments who operate more than normal hours?	
8. Any major changes, trends in your industry and how are they affecting you?	
9. Any major changes, trends in your company and how are they affecting you?	
10. Any major changes, trends in your company's gizmo requirements and how are they affecting you?	
11. Coordinate with Internal Sales as renewal time nears.	
a. Assess Retention Status (A Assured, B Some Issues, C Uncertain)	
b. Determine Customer Maintenance Level (scale 1 to 5 with 5 being high)	
c. Determine Net Contribution to date.	
12. Assess quality of this customer as a reference (A Unconditional, B Conditional)	
13. After each encounter with person:	
a. Set Retention Priority (scale 1 to 5 with 5 being top)	
b. Determine revenue potential on scale 1 to 5 with 5 being top for Up Sell Cross Sell Increase Volume	
c. Assess quality of contact as influencer on scale 1 to 5 with 5 being top for External Internal	
d. Add to Contact Information	

FIG. 49/62

1050



FIG. 50/62

1060



Herbert Ficus
CEO
800-456-7890
hficus@plantsunlimited.com
x Email Permission

Plants Unlimited
17 Green Street
Suite 100
San Francisco CA 94123
CEL# 7.000



PROFILING QUESTIONS RETENTION

Interaction
Priority Action
Search Contact
Add Contact
Add Relationship

Reports
Utility



STRATIX
Relationship Tracking System

©2001 STRATIX™
Patent Pending

Select Contact Information | Select Profiling Questions | Select Knowledge Screening

Choose From | Choose From | Choose From

New Customer Survey #1:

Customer Satisfaction:	
Just wanted to check in with you and see if everything is going smoothly for you as we get started working with you. We don't want things ever to just be okay. We want things to be so wonderful that you'll be telling others about us.	
1. Have we treated you right in making the transition?	
2. Anything I should be watching out for?	
3. Anything you are concerned about?	
4. So I make sure to pay special attention to it, is there anything that you are particularly looking forward to in working with us? (Answers will indicate new CEL level or validate that they remain in old one. Note change in level here and any general comments. Primary evaluation here is, has XYZ Company moved past Expectant or Trial levels or not? Does anything need to be done now to ensure that this contact becomes a Loyal customer at a minimum?)	
Industry Trend Information:	
5. Any major changes, trends in your industry and how are they affecting you?	
6. Any major changes, trends in your company and how are they affecting you?	
7. Any many changes, trends in your company's gizmo requirements and how are they affecting you?	
Targeting Information:	
9. Where do you get your information about the gizmo industry? (Publications, conferences, trade shows, people.)	
10. Who do you listen to?	
11. Who do you think of as a thought leader? Would XYZ Company be on your list?	
12. If they are not already on it: Would you like to be on our email list for a Free Gizmo Email Tip of the Month?	

1070

FIG. 51/62

Free Gizmo Email Tip of the Month:	
13. Add to Contact Information.	



FIG. 52/62

1080



Herbert Ficus
CEO
800-456-7890
hficus@plantsunlimited.com
X Email Permission

Plants Unlimited
17 Green Street
Suite 100
San Francisco CA
94123
CEL# 6.000



KNOWLEDGE SCREEN RELATIONSHIP VALUE

Select Contact Information | Select Profiling Questions | Select Knowledge Screening

Choose From | Choose From | Choose From

- Interaction
- Priority Action
- Search Contact
- Add Contact
- Add Relationship
- Reports
- Utility



STRATIX
Relationship Tracking System

©2001 STRATIX™
Patent Pending

Customer Lifetime Value (CLV)	
Potential (three years)	$282,592
Net Contribution (to date)	
Difference	
Revenue Potential Rating	
Up Sell	
Cross Sell	
Increase Volume	
Buzz Influence	
# Referrals	
# References	
# Testimonials	
Influencer Rating	
External	4
Internal	
Acquisition Value	
Put on Email List	Yes
Check Back Later	
Closing Value	
Priority	5
Closing Status	this month
Retention Value	
Priority	
Retention Status	
Customer Maintenance Level	

109

1092

1090

FIG. 53/62



Herbert Ficus
CEO
800-456-7890
hficus@plantsunlimited.com
x Email Permission

Plants Unlimited
17 Green Street
Suite 100
San Francisco CA 94123
CEL# 6.000



KNOWLEDGE SCREEN PRODUCTS/ SERVICES

Interaction
Priority Action
Search Contact
Add Contact
Add Relationship
Reports
Utility



STRATIX
Relationship Tracking System

© 2001 STRATIX™
Patent Pending

Select Contact Information | Select Profiling Questions | Select Knowledge Screening

Choose From | Choose From | Choose From

# Gizmos:	175
Importance:	5
Problems With:	5
Gizmo Use:	5
How Handle:	Themselves
Most Common Complaints:	
Major Issues:	
Contract Length:	3 years
Start Date	03/01/01
Yearly Revenue:	$360,000
Monthly Revenue:	$30,000
# of Locations under Contract:	1



1100

FIG. 54/62



Herbert Ficus
CEO
800-456-7890
hficus@plantsunlimited.com
x Email Permission

Plants Unlimited
17 Green Street
Suite 100
San Francisco CA 94123
CEL# 6.000



KNOWLEDGE SCREEN PRODUCTS/ SERVICES

Interaction
Priority Action
Search Contact
Add Contact
Add Relationship
Reports
Utility

Select Contact Information
Select Profiling Questions
Select Knowledge Screening

Choose From | Choose From | Choose From

# Gizmos:	175
Importance:	5
Problems With:	5
Gizmo Use:	5
How Handle:	Themselves
Most Common Complaints:	
Major Issues:	
Contract Length:	3 years
Start Date	03/01/01
Yearly Revenue:	$35,000
Monthly Revenue:	$2,917
# of Locations under Contract:	1



STRATIX
Relationship Tracking System

© 2001 STRATIX™
Patent Pending



1110

FIG. 55/62



Herbert Ficus
CEO
800-456-7890
hficus@plantsunlimited.com
x Email Permission

Plants Unlimited
17 Green Street
Suite 100
San Francisco CA 94123
CEL# 6.000



KNOWLEDGES SCREEN COMPANY INFORMATION

Interaction
Priority Action
Search Contact
Add Contact
Add Relationship

Reports
Utility



STRATIX
Relationship Tracking System

© 2001 STRATIX™
Patent Pending

Select Contact Information | Select Profiling Questions | Select Knowledge Screening

Choose From | Choose From | Choose From

Size:	$100-500 million
SIC Code:	
Industry:	Industry
Other:	
Type of Business:	
Year End:	12/31
Years in Business:	25
Credit Code:	Very Good
Metro:	SFO San Francisco
Enterprise Status:	Headquarters
# Employees:	1,000-4,999
Expected Growth:	
# Locations:	3



1120

FIG. 56/62

XYZ COMPANY

Herbert Ficus
CEO
800-456-7890
hficus@plantsunlimited.com
x_ Email Permission

Plants Unlimited
17 Green Street
Suite 100
San Francisco CA 94123
CEL# 6.000

VOICE MAIL | FAX | EMAIL | PRINT | LIST | SUBMIT | HELP

KNOWLEDGE SCREEN BUSINESS INTELLIGENCE

- Interaction
- Priority Action
- Search Contact
- Add Contact
- Add Relationship
- Reports
- Utility



STRATIX
Relationship Tracking System

© 2001 STRATIX™
Patent Pending

Select Contact Information | Select Profiling Questions | Select Knowledge Screening

Choose From | Choose From | Choose From

Acquisition

Date	Saw Marketing Materials	Awareness Level
12/2/00	Yes	Aided Aware

Closing

Date	Feedback Notes	Awareness Level

Retention

Date	Survey Notes	Satisfaction Level	Modified CEL Level

Targeting Research Commentary

Independent study 8/12/00 tested potential for XYZ Company. XYZ relatively unknown, but critical need found with companies that have more than 150 gizmos and over $100 million in revenue.

Awareness: Unaware

Tracking Research Commentary

Independent study12/27/00 rated XYZ Company against its competitors. XYZ being considered more frequently than ABC Company by a ratio of 10:1.

Awareness: Consideration

Competition

ABC Company

FIG. 57/62

1130

Individual Correlation With Awareness/Satisfaction Research

Date	Awareness Level	Satisfaction Level	Existing CEL Level	Modified CEL Level
08/12/00	Unaware		0.000	
12/19/00	Aided Aware		2.040	
12/27/00	Consideration		4.000	



FIG. 58/62

1140



Herbert Ficus
CEO
800-456-7890
hficus@plantsunlimited.com
x_ Email Permission

Plants Unlimited
17 Green Street
Suite 100
San Francisco CA 94123
CEL# 6.000



ADD RELATIONSHIP

Interaction
Priority Action
Search Contact
Add Contact
Add Relationship

Reports
Utility



STRATIX
Relationship Tracking System

© 2001 STRATIX™
Patent Pending

Select Contact Information | Select Profiling Questions | Select Knowledge Screening

Choose From | Choose From | Choose From

Relationship:	Administrative Assistant
Salutation:	Mr.
First Name:	Clarence
Middle Name:	
Last Name:	Orchid
Title:	Aide
Company:	Plants Unlimited
Address1:	17 Green Street
Address2:	Suite 100
City:	San Francisco
State:	CA
Zipcode:	94123
Phone:	415-456-7890
Extension:	
FAX:	
Cell Phone:	
Pager:	
Voice Mail:	
800#:	456-7890
Email:	corchid@plantsunlimited.com
Secondary Email:	
URL:	www.plantsunlimited.com
Starting CEL #:	6.000
Reference #:	CA Test 1-add
Source:	CA Test 1
Source Details:	Herbert Ficus
Customer #	
Prefers Reach Via:	E-mail

FIG. 59/62

1150

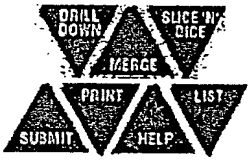
On job / yrs	
As _____ years	
Gender:	Male
Delivery Team:	
[redacted]	[redacted]
Alternative Address1:	
Alternative Address2:	
Alternative City:	
Alternative State:	
Alternative Zipcode:	



FIG. 60/62

1160





REPORTS

















STRATIX™
Relationship
Tracking
System

© 2001 STRATIX™
Patent Pending

Reports

Input Templates:
Strategic Brand Readiness (SBR) Factor Template
Customer LifeCycle Profitability Model Template
Interaction ROI (I ROI) Template

Reports:
Strategic Brand Readiness (SBR) Summary Report

Customer LifeCycle Profitability Model
Alternative Strategies Comparison

Customer LifeCycle Profitability Model Summary Report

Interaction ROI (I ROI) Summary Reports
- Phase Level Process
- Phase Level Events
- CEL Level Process
- CEL Level Events

Individual Interaction ROI (I ROI) Report

Interaction ROI (I ROI) Model Report

Individual Correlation with Awareness/Satisfaction Research

Correlation with Awareness/Satisfaction Research Model Report

Deposition of Contacts Summary Reports
- By Phase Level
- By Status
- By Origination

Top Priority Customers Profile Reports
- Characteristics
- Attributes



FIG. 61/62

1300

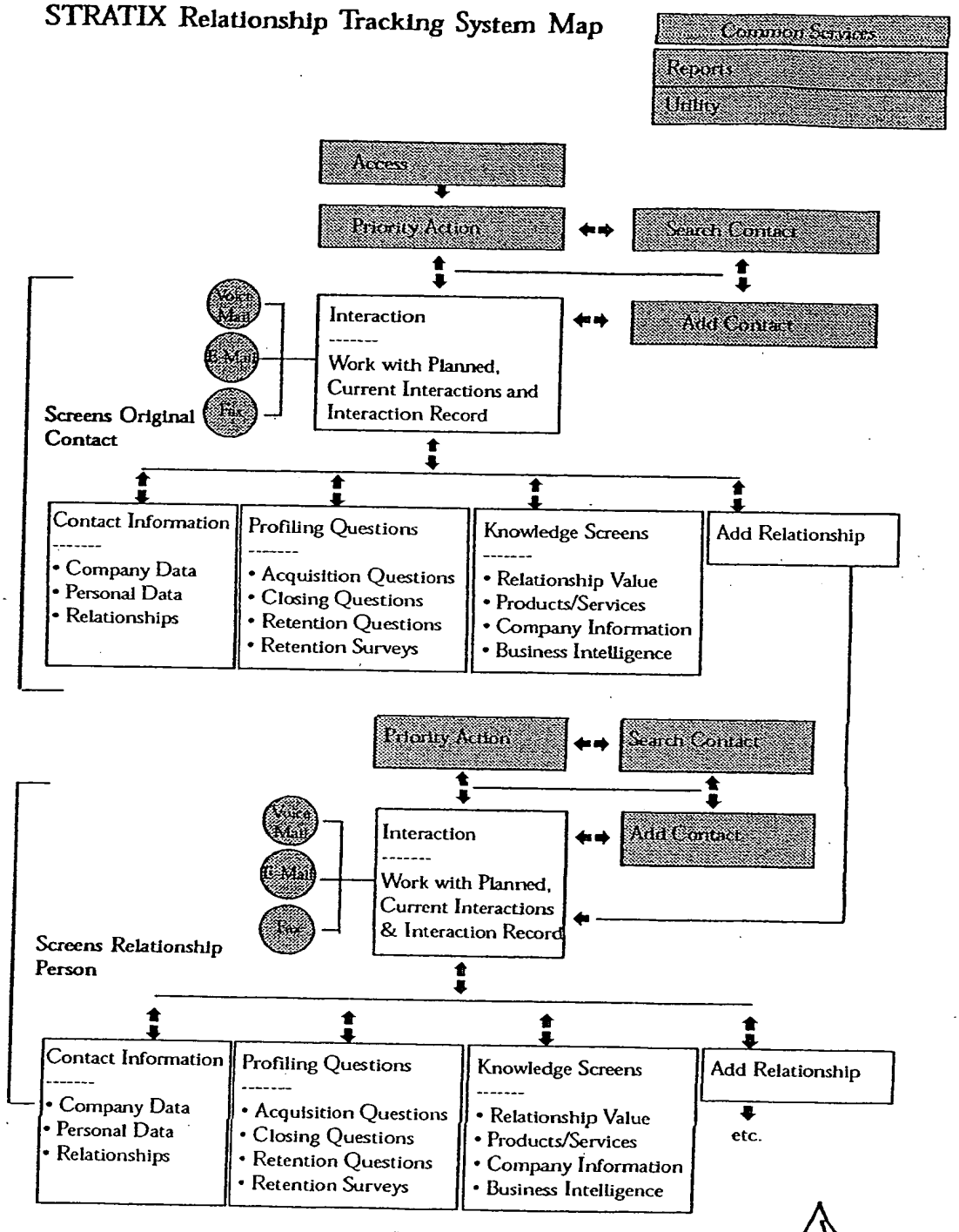

STRATIX Relationship Tracking System Map
Common Services
Reports
Utility
Access
Priority Action
Search Contact
Add Contact
Voice Mail
E-Mail
Fax
Interaction
Work with Planned, Current Interactions and Interaction Record
Screens Original Contact
Contact Information
• Company Data
• Personal Data
• Relationships
Profiling Questions
• Acquisition Questions
• Closing Questions
• Retention Questions
• Retention Surveys
Knowledge Screens
• Relationship Value
• Products/Services
• Company Information
• Business Intelligence
Add Relationship
Priority Action
Search Contact
Add Contact
Voice Mail
E-Mail
Fax
Interaction
Work with Planned, Current Interactions & Interaction Record
Screens Relationship Person
Contact Information
• Company Data
• Personal Data
• Relationships
Profiling Questions
• Acquisition Questions
• Closing Questions
• Retention Questions
• Retention Surveys
Knowledge Screens
• Relationship Value
• Products/Services
• Company Information
• Business Intelligence
Add Relationship
etc.
1500

FIG. 62/62